

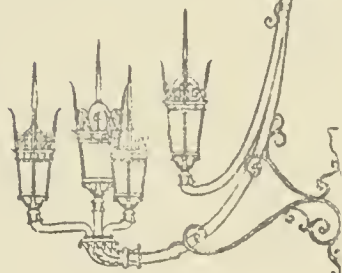
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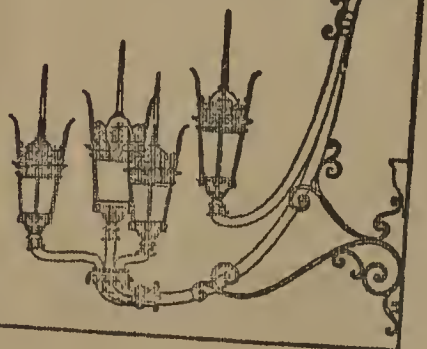
PARCEL TO PARCEL LINKAGE  
PROJECT 2

PARK SQUARE AND TRANSITIONAL HOUSE

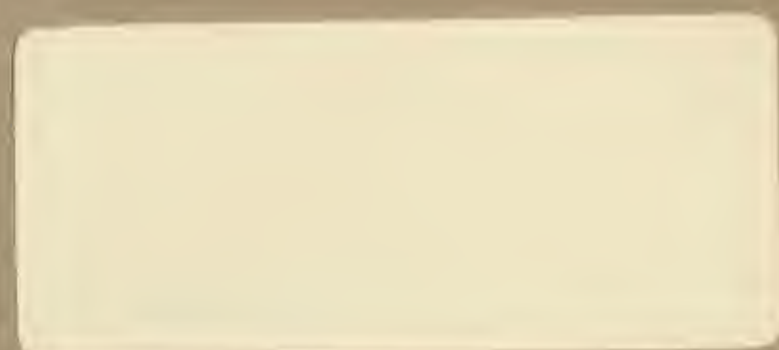
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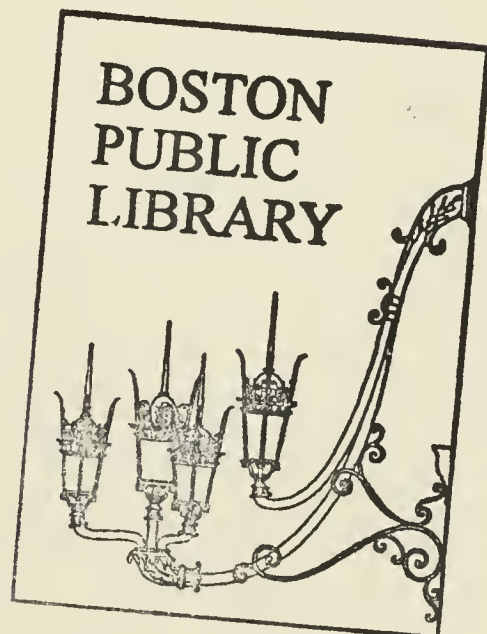


PROPOSAL

PARCEL TO PARCEL LINKAGE  
PROJECT 2

PARK SQUARE AND TRANSITIONAL HOUSING

November 6, 1987









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1.00 LETTER OF INTEREST







# THE SOUTH PARK PARTNERSHIP

720 STATLER OFFICE BUILDING  
BOSTON, MASSACHUSETTS 02116  
(617) 482-8925

November 6, 1987

Mr. Stephen Coyle, Director  
Boston Redevelopment Authority  
One City Hall Square  
Boston, Massachusetts 02201

Dear Mr. Coyle:

Please regard this as a formal letter of interest by The South Park Partnership to participate as the developer in the Parcel to Parcel Linkage 2 Project, which includes sites located in Park Square and the South End.

The South Park Partnership is comprised of Boston-based individuals, who are experienced in each and every aspect required by this Request for Proposal.

o Jay R. Schochet and Peter A. Lewis of Schochet Associates are seasoned developers of residential and commercial properties, including the development of low and moderate-income housing. Schochet Associates has demonstrated knowledge in project management, analyzing the financial feasibility of a project, project financing and property management.

o Pamela G. McDermott, President of Northeast Management & Marketing Company, Inc. has expertise in government and community relations, having consulted on such matters on other major Boston development projects. Northeast Management & Marketing Company also has an impressive background in media relations, and the development of child care centers.

o Charles Grigsby brings his strengths in project financing, community relations and transitional housing development to the team. Having served on numerous organizational boards and as a South End resident, he is aware of the providers of social services who could assist our team in providing the requisite social services to the transitional housing residents.







o Joseph D. Feaster, of Feaster Enterprises, has a strong background in the legal aspects of real estate development, the Boston jobs and fair housing policies, and the development of child care facilities. His government and community relations expertise have been demonstrated by his service on numerous community organization and boards, in state government, and on governmental advisory committees.

o Samuel E. Mintz, of Mintz Associates Architects/Planners, Inc., is an architecture and planning firm with a proven track record of well-designed commercial and residential properties in the City of Boston. Having participated in numerous development projects in Boston, he is sensitive to governmental and community concerns with regards to design, open space and the appropriate amenities for such development projects.

Furthermore, to strengthen our team's expertise in specific areas, we have engaged the services of the following consultants: Meredith & Grew, Inc., through Thomas Hynes and Kevin C. Phelan, nationally recognized for their knowledge in the areas of project development, financing and marketing; Shelter, Inc., through its Executive Director, David F. Whitty, and its Board President, Alison S. Lauriat, for their expertise in the area of building design and program development for transitional housing; Summa Associates, Inc., through Ann Vincola, a nationally-recognized firm located in Boston, for its expertise in developing child care facilities and programs; Gaston Snow & Ely Bartlett, through John Dineen and James Marcellino, for its legal expertise in real estate development; and Federal Management Co., Inc. for their extensive knowledge in property management.

We have, in our proposal, more than adequately addressed all of the requirements of the Request for Proposal. On the Park Square site, we propose developing a 15-story building with 146 units of residential condominiums occupying more than 175,000 square feet, 90,000 square feet of office space, 22,000 square feet of retail space, 3,000 square feet for a child care facility financed by the South Park Partnership, and 265 parking spaces. On the South End site, we propose to finance the development of 36 units occupying more than 40,000 square feet of space for our transitional housing residents, 3,000 square feet of community service space, as well as to partially finance the operating budget of Shelter, Inc. There







Mr. Stephen Coyle, Director  
November 6, 1987  
Page Three

will be 24 affordable condominium units occupying more than 27,000 square feet, 30 market rate units occupying 33,750 square feet, a child care facility financed by our team occupying 3,000 square feet of space, and 70 parking spaces.

Accordingly, we feel confident we have assembled a qualified team with a demonstrated track record which will enable us to address effectively the requirements of the Request for Proposal. We are sensitive to the social concerns and are prepared to meet them; we are sensitive to the design concerns and are prepared to meet them; we are committed to and intend to comply aggressively with the City of Boston's Fair Housing Plan; and we will prepare an Affirmative Marketing Plan which will allow our projects to reflect the diversity which exists in our great city.

We thank you for your consideration of our proposal, and trust that you will determine that The South Park Partnership has presented a proposal which exceeds the expectations of the Boston Redevelopment Authority.

Very truly yours,

THE SOUTH PARK PARTNERSHIP

By: 

Jay R. Schochet















## 2.00 THE SOUTH PARK PARTNERSHIP - A LOCAL DEVELOPMENT

### 2.10 Introduction

The South Park Partnership development team is comprised of individuals and firms with long-standing histories and credible track records in Boston. Each Partner and consultant on this project knows and understands the complex and arduous development process in Boston, and believe that the neighborhoods and City are better for it. We are fully committed to neighborhood and community involvement.

We believe in the involvement of minorities, women and non-profit organizations in the real estate development boom in Boston, and think that Parcel to Parcel linkage is an excellent vehicle to promote this equality. We have a team that is comprised of all of the above-mentioned groups; people who have real strengths and skills who can benefit from long-term, day-to-day involvement with a specific project, and who will spin off those financial and educational rewards to other minorities, women and non-profit groups.

We believe in the parcel to parcel linkage concept. The benefits of tying a valuable downtown site with a neighborhood project allows for the development of more affordable housing and creates the financial pool necessary to support creative and progressive social service packages like transitional housing.

We are a Boston team, committed to good development, long-term involvement, community and neighborhood input, education and financial opportunities for women, minorities and non-profit groups, and most of all a positive successful future for Boston.







2.20 The Team

PARTNERS

Schochet Associates

Jay R. Schochet, President

Peter A. Lewis

Northeast Management & Marketing Company, Inc.

Pamela G. McDermott, President

Charles T. Grigsby

Feaster Enterprises

Joseph D. Feaster, President

Mintz Associates Architects/Planners, Inc.

Samuel E. Mintz, President

THE SOUTH PARK PARTNERSHIP  
DEVELOPMENT CONSULTANTS

Meredith & Grew, Inc.

Thomas Hynes, President

Kevin C. Phelan, Senior Vice President

Gaston Snow & Ely Bartlett

John K. Dineen

James C. Marcellino

Summa Associates, Inc.

Ann M. Vincola, Principal

Shelter, Inc.

Alison Lauriat, Chairman of the Board

David Whitty, Executive Director

Federal Management Company, Inc.

Jason J. Timmons, President







## 2.30 Our Boston Traditions

\* A Boston team, comprised of local individuals and firms with long-standing histories and involvement, as well as credibility and track records in the City of Boston.

\* We understand the complexities of the development process in Boston and believe the neighborhoods and the City are better because of it.

\* We are here to stay, not to develop the sites and pack up to return to other cities.

\* All of the General Partners are longtime Boston residents. All of the Partner's firms, and most of the consultant firms are Boston based.

\* We care about the future of Boston and believe a good development team must maintain a continued relationship with its projects.

\* We firmly believe that minorities, women and non-profit organizations should share in the real estate development boom in Boston, and consider parcel to parcel linkage an excellent vehicle to foster this position. Our team is comprised of all of the above-mentioned groups, with real strengths and skills, with an opportunity to benefit from long-term day-to-day involvement with the projects, and a chance to share in the financial and educational rewards which in turn can be shared with other minorities, women and non-profit organizations.

\* We are committed fully to neighborhood and community input and involvement, and have incorporated neighborhood people into our project team.

## 2.40 The Partners

2.41 Schochet Associates is a privately owned real estate development and management company headquartered in Boston, Massachusetts.

Its major areas of concentration are the construction or rehabilitation of properties for rental housing, condominiums, and office buildings. The Company has also developed shopping centers, residential communities, and multi-use complexes.

Schochet Associates maintains the following capabilities: research and feasibility analysis; land or building acquisition; engineering/design/construction supervision; and financing, management, and marketing services.

It is a diversified company, with projects throughout Massachusetts, Maine, Rhode Island, Connecticut, Georgia, California, and the State of Washington. Its experience encompasses the construction of large







mixed-use condominium developments, rehabilitation of historic buildings, and new construction of rental housing and commercial space. The Company has succeeded with a wide variety of projects, including the new construction of luxury condominiums in Newport, Rhode Island; government-assisted housing in Portland, Maine; the rehabilitation into housing units of a landmark, granite cotton mill in Whitinsville, Massachusetts; and the reconstruction of an industrial warehouse into a first-class office building in Cambridge, Massachusetts.

#### Jay R. Schochet

In 1973, following several years in the Boston real estate community, most significantly as Managing Partner and subsequently President of the Codman Company, Inc., Jay Schochet formed his own real estate development company - Schochet Associates. Under these auspices he has concentrated on the development and management of projects throughout New England, California and Washington State. In every instance he acts as a principal. He has had many years of experience in building all types of housing, from affordable apartments for the elderly to luxury condominiums, as well as industrial and commercial structures, and large office buildings. He is equally comfortable with rehabilitation or new construction, conventionally financed or government subsidized projects.

In addition to Schochet Associates, Mr. Schochet formed Federal Management Company, Inc., which specializes in the management of commercial and residential property. Together, Schochet Associates and Federal Management Company, Inc. constitute a well-rounded, totally experienced real estate development and management team able to offer each project the skill and expertise so necessary in today's competitive market.

In 1983, he organized JRS Equities, Inc. to act for Schochet Associates in the acquisition of income producing properties in growing markets nationwide. JRS Equities has acquired for Schochet Associates, properties in Atlanta, Georgia and Seattle, Washington.

He is a member of the Greater Boston Real Estate Board, the Rhode Island Real Estate Board, the National Association of Home Builders, the National Association of Realtors, and the Chambers of Commerce of Boston and Newport, Rhode Island.

Peter A. Lewis joined Schochet Associates in 1984. He is responsible for the company's development program and has experience in pre-development and project management activities involving both new construction and the reuse of existing structures. Prior to joining Schochet Associates, Mr. Lewis worked for Urban Investment and Development Company, and was primarily associated with the \$525 million mixed-use Copley Place development which opened in Boston in 1984. Mr. Lewis was also involved in the planning of 900 North Michigan Avenue, a mixed-use tower under construction in Chicago.







Before relocating to Boston, Mr. Lewis was employed in New York by Helmsley-Spear and was responsible for project management for the Helmsley Palace and New York Helmsley hotels. He also has a background as a real estate loan officer and is a Registered Architect.

#### 2.42 Pamela G. McDermott and Northeast Management & Marketing Company

Pamela G. McDermott is Founder and President of Northeast Management & Marketing Company, a full-service marketing and public relations firm, and Vice President of Northeast Affiliates, a real estate development & consulting group. Northeast Management & Marketing Company has worked on numerous real estate development projects, such as 125 Summer Street and 125 High Street, providing government and community relations counsel, as well as developing creative linkage and public benefit packages. She recently addressed the Employer-Sponsored Childcare Network on developer-sponsored daycare. In her role as Vice President of Northeast Affiliates, she has been involved in the purchase and renovation of 30 residential units in Roxbury, and is an investor and consultant in two additional affordable housing projects in Roxbury. Northeast Affiliates is also participating in a proposal to renovate a building in Back Bay. Ms. McDermott is also a licensed real estate broker.

Her marketing expertise reinforced by her experience as Director of the Boston office for D.H. Sawyer & Associates, a New York-based political and corporate communications firm, and as Project Director for the Marketing office of the City of Boston. Pamela McDermott has also held many governmental positions - Special Assistant to Lieutenant Governor Tom O'Neill, Governor Dukakis' Representative to the New England Governors' Conference, and Staff Coordinator to the Advisory Board of the Coalition of Northeastern Governors. Ms. McDermott was also a candidate for the Boston City Council in 1981.

Ms. McDermott's community activities are extensive. She serves as an Alternate on the Boston Landmarks Commission. Ms. McDermott is on the Board of Directors of the Big Sister Association of Greater Boston and is currently Chairman of the Public Relations Committee. For the past two years she served as Co-Chairman of the annual "Celebrities Ball" for the Big Sister Association. She also serves on the Board of the Boston Cable Access Foundation and is active in many other charitable activities including the Laboure Center of South Boston and the Pope John XXIII National Seminary. Ms. McDermott is on the Board of Advisors for the International Cultural Exchange (ICE), a group promoting better communications between the U.S. and USSR through sports exchanges, and she was appointed to serve on the Board of Directors of Women's Enterprises. Ms. McDermott also serves on the Committee for the 75th Anniversary Celebration of the Boston Center for the Arts. She is a member of the Executives Club of the Greater Boston Chamber of Commerce.







## 2.43 Charles T. Grigsby

Charles T. Grigsby is President of the Massachusetts Community Development Finance Corporation and past President of Massachusetts Venture Capital Corporation. Mr. Grigsby has a strong background in real estate finance having supervised investments for over 34 real estate projects, most of which involved low and moderate income housing. He provided equity and subordinated investments which enabled a minority developer to rehabilitate over 300 units of low and moderate income housing, and provided investments which resulted in the conversion of a surplus school building into affordable housing.

Mr. Grigsby's community and program development activities have been extensive. As Chairman of the Board of the Urban League of Eastern Massachusetts, he guided policy development of the Urban League's employment, training and teenage pregnancy prevention and male responsibility programs. As National President of the United Neighborhood Centers of America, he set policy and established program goals for 72 affiliates throughout the United States in family life, skill training and job acquisition, housing placement, and affirmative action planning programs. As both a member and a Chairman of the Massachusetts State Board of Education, Mr. Grigsby established policy for all school committees in the Commonwealth in the areas of vocational training and occupational education, education of special needs children, adult education policy and regulation, and teacher certification. Mr. Grigsby is a Director of the ICA Revolving Loan Fund, a Steering Committee member of the Chamber of Commerce Boston 2000, and was a Founding Director of the Boston Bank of Commerce and Chairman of its Loan Policy and Review Committee.

## 2.44 Feaster Enterprises

Joseph D. Feaster, an attorney, is President of Feaster Enterprises and the Assistant Director of Real Estate for the Massachusetts Turnpike Authority. For the past ten years he has provided legal representation in real estate transactions for numerous clients, and is the attorney for the developer for the proposed 128 units of housing known as Fountain Hill Square Development in Roxbury.

Mr. Feaster has been pursuing an interest in real estate development for the past few years, and has been exploring development opportunities in Massachusetts, New York, and New Jersey. He has taken courses in real estate financial analysis, and participates in an intensive real estate development training program offered by the Minority Developers Association, Massachusetts Institute of Technology's Center for Real Estate Development and the City of Boston's Office of Jobs and Community Services.

He is knowledgeable on the formation of child care centers having served on the steering committee which created the child care center at the Commonwealth's Transportation Building (Transportation Children's Center, Inc.) and, in fact, was one of its incorporators.







In the area of Fair Housing and Affirmative Action, Mr. Feaster, while serving as Assistant Secretary and General Counsel in the Commonwealth's Executive Office of Administration and Finance, had oversight responsibility for the Massachusetts Commission Against Discrimination (MCAD) and the State Office of Affirmative Action. He directed the administration's efforts in complying with the Culbreath Consent Decree from 1983-1985; he assisted in preparing legislation revising Chapter 151B, the enabling legislation for governing the MCAD, and served on an Advisory Committee which made recommendations revising the practices and procedures of the MCAD. He was a co-drafter of Executive Order 237, the Governor's Minority Development Program, and spearheaded the drafting of the attendant regulations. He was co-drafter of Executive Order 227, which amended the Governor's Code of Fair Practices, and served on the Governor's Civil Rights Working Group.

Mr. Feaster served two terms as President of the NAACP's Boston Chapter; is a past co-chair of the Greater Boston Civil Rights Coalition; and a founding member of the Minority Developers Association.

#### 2.45 Samuel E. Mintz, A.I.A., A.I.C.P.

Samuel E. Mintz, A.I.A. - A.I.C.P., is President of Mintz Associates Architects/Planners, Inc., a firm he started in 1964 after serving as Director of Planning and Design for the Downtown Waterfront - Faneuil Hall Urban Renewal Project. His background in architecture and planning is extensive as a result of numerous projects in which he has been involved in Massachusetts, particularly in the Greater Boston area. He designed the 381 unit Shore Plaza East development in East Boston, the 150 unit Knights of Columbus elderly housing in the North End, the 212 unit Charlesview Apartment in Allston, the Essex Bank Regional Headquarters office in Peabody, the Bostonian Hotel in Boston, the 210 South Street Office Building in Boston, the 82 unit Courtyard Condominium housing development in Charlestown, and the 449 unit Harbor Point (Columbia Point) mixed income housing complex in Dorchester. Mr. Mintz also provided the planning for the Watertown Arsenal, Boston Gas (Park Square), John Hancock (Copley Place), and Blue Cross/Blue Shield of Massachusetts (Boston Financial District).

He has been a visiting critic and guest lecturer at M.I.T, Harvard University, the Boston Architectural Center, Tufts University, Boston College, Carnegie Mellon University, and Tuskegee University.

Mr. Mintz is a member of the American Institute of Certified Planners, the American Institute of Architects, the National Association of Housing and Redevelopment Officials, the Massachusetts Construction Industry Council, and the National Council of Architectural Registration Boards.







## 2.50 The Consultants

### 2.51 Meredith & Grew

Founded in 1875, Meredith & Grew has served corporations, partnerships, institutions, real estate developers, and large and small business organizations. The firm has played an active role in shaping the historic and contemporary appeal of Boston. It is a full-service real estate organization of over forty professional practitioners and a total staff of approximately two hundred. Trust, integrity, and confidentiality characterize the firm's relationships.

The primary focus of the Company is on commercial, industrial and institutional properties in the New England area, although significant work is being done throughout the U. S. on behalf of New England clients, through affiliation with The Office Network, the Society of Industrial Realtors and the American Society of Real Estate Counselors which are national organizations. Services provided include appraisal, brokerage, counselling, development services, property management, and real estate finance.

Meredith & Grew services are characterized by vision, creative planning, and professional execution. The variables involved in the real estate profession are fully understood and there is pride in a tradition of thoroughness.

### 2.52 Gaston Snow & Ely Bartlett

Gaston Snow & Ely Bartlett's Real Estate Department includes seven partners, one Of Counsel, 15 associates, two rotatees, three paralegals and three title examiners. They represent buyers and sellers of all kinds of real estate, lessors, lessees, developers, borrowers, lenders and public authorities - anyone who deals in any way with real estate.

A number of people within the Department specialize in environmental matters, since environmental laws and regulations play an increasing role in the development and use of real estate.

Most of the firm's work is for commercial and industrial clients. All have special areas in which they tend to concentrate but, as a team, they cover all areas of real estate law and practice and take pride in doing high quality work in a timely manner.

### 2.53 Summa Associates, Inc.

Summa Associates, Inc. is the first national consulting firm specializing in corporate child care planning and management. Summa was formed in 1986 through a merger of three regional firms including, Burud and Associates of Los Angeles, Contemporary Ventures in Child Care of Phoenix, and Corporate Child Care







Consultants of Boston. Ann Vincola, a principal of the former Corporate Child Care Consultants operated in Massachusetts since 1982. Summa has designed on-site child care facilities for many corporate clients namely, Hill, Holiday, Connors, Cosmopolos; the Howard Johnson Company; Prime Computer, Inc.; and Bose Corporation. Summa has also consulted on child care proposals with the City of Randolph, First Baptist Church, Southwest Child Care Coalition and the Combined Jewish Philanthropies to name a few. Summa has extensive knowledge in program development, program management, facility design, financial assistance programs and conducting needs assessments/ feasibility studies in relation to child care facilities.

#### 2.54 Shelter, Inc.

Shelter, Inc., a not-for-profit agency founded in 1974, currently operates two shelter facilities in Metropolitan Boston. Its Cambridge Shelter provides lodging, meals, counseling, casework and advocacy and resettlement assistance to twenty needy persons a night, as well as a long-term transitional unit at the Cambridge YWCA for single parent women and their children. Its Boston Family Shelter, located in the South End, is a transitional shelter which provides housing, meals, individual and family counseling, case advocacy and relocation assistance for eight to ten families. In 1986, Shelter, Inc. founded an affiliate educational corporation named Family Life Education, Inc. for the purpose of providing educational programs designed to assist homeless families break the cycle of poverty.

#### 2.55 Federal Management Company, Inc.

Federal Management Company, Inc., a Boston based firm, has regional offices in Newport, Rhode Island, Atlanta, Georgia, Los Angeles, California and Seattle, Washington. These offices provide management services for all Schochet Associates' developments and acquisitions. Responsibilities include leasing activities, cash flow projections, tenant relations, personnel administration, insurance and real estate tax matters, accounting functions, and building operations. Its residential portfolio includes all types of housing, from luxury condominiums to low and moderate subsidized rental units, new construction and rehabilitation as well as market rate rental apartment units. Its commercial portfolio comprises offices and stores, shopping malls, restaurants, and old and new office buildings.







- \* CHARLES GRIGSBY is Chairman of the Board of Directors of the Urban League of Eastern Massachusetts, is a Founding Director of Boston's only minority-owned bank, the Boston Bank of Commerce, and was National President of the United Neighborhood Centers of America.
- \* JOSEPH FEASTER is a Founding Member of the Minority Developer's Association, has had oversight responsibility for the Massachusetts Commission Against Discrimination (MCAD) and the State Office of Affirmative Action, was co-drafter of Executive Order 237, was on the Governor's Civil Rights Working Group, served two terms as President of the NAACP's Boston Chapter, and is the past co-chair of the Greater Boston Civil Rights Coalition.







2.60 THE SOUTH PARK PARTNERSHIP - OPPORTUNITIES FOR MINORITIES,  
WOMEN AND NON-PROFIT ORGANIZATIONS

We understand and believe in the real involvement of minorities, women and non-profit, community-based providers. Our team has made a serious commitment to the philosophy of "Building capacity" - providing an environment for minorities, women and non-profits to learn the intricacies of the development process, and to use that knowledge in the future to start or participate in additional ventures, which will enable the hiring and training of others.

The South Park Partnership has incorporated the following minorities, women and non-profit, community-based organizations:

- \* Two of the four General Partners are Minority Business Enterprises (MBE), and one of the four is a Women's Business Enterprise (WBE).
- \* Our daycare consultant is Summa Associates, Inc., the first national corporate child care planning and management firm, and a Women's Business Enterprise (WBE).
- \* Our transitional housing consultant is Shelter, Inc., the community-based, non-profit provider/manager of the Boston Family Shelter.
- \* Our Property Manager for both sites, will be Federal Management Co., Inc., the management affiliate of Schochet Associates. 46% of the total workforce of Federal Management are women; 30% hold positions of authority including the Vice President, three Regional Managers, and 10/12 on-site Managers. Minorities represent 15% of the total workforce. Schochet Associates has made a commitment to hire and train minorities and women for all jobs relating to both sites, to provide another example of "building capacity" for the future. In addition, Schochet Associates has made a commitment to professionally train the permanent Manager and owners (Trustees) of the transitional housing program so that they are ultimately self-sufficient.
- \* We have contacted over 50 non-profit, community-based, social service providers to determine their ability to provide services to the South End transitional housing program.

The members of the South Park Partnership have been involved in promoting minorities, women, and non-profit community organizations for many years, as witnessed by the following examples:

- \* PAMELA MCDERMOTT serves on the Board of Directors of the Boston Cable Access Foundation (which promotes access to all sectors of the population), and the Board of Directors of Women's Enterprises, a group developed by the Governor's Office of Economic Affairs to develop employment and training programs for low-income women.







## 2.70 THE SOUTH PARK PARTNERSHIP - DEVELOPMENT OBJECTIVES.

As evidenced, Jay Schochet made an early and impressive commitment to seek out qualified individuals and organizations that could round out the South Park team. His goal was to involve minorities, women and non-profit community-based providers, who had limited experience in real estate development, to afford these individuals and their organizations an opportunity to "learn on the job." The Partnership is an impressive team, comprised of individuals and firms with differing strengths, with much to learn and the opportunity to build capacity. Everyone on the team will be assigned certain areas of responsibility, yet everyone will also be involved in all aspects of the job, and in decision-making. Every team member will be involved in BOTH sites, not the less experienced individuals in the South End and Schochet Associates at Park Square. All Partners will be required to make a capital contribution to participate in the equity ownership, again the significance being equality in decision-making, responsibility, roles, and reward.

The following is a brief description of each Partner's role in the Parcel to Parcel 2 projects:

### SCHOCHET ASSOCIATES

- \* Developer, residential & commercial
- \* Financial Proposals
- \* Project Management
- \* Property Management

### NORTHEAST MANAGEMENT & MARKETING COMPANY

- \* Government/community relations
- \* Daycare liaison
- \* Media relations
- \* Marketing/leasing
- \* Transitional housing program development
- \* Social service provider liaison
- \* Boston Resident Job Policy - marketing
- \* Affirmative action - marketing
- \* Fair housing - marketing

### CHARLES GRIGSBY

- \* Affordable housing - financing
- \* Transitional housing financial plan
- \* Community Relations
- \* Daycare liaison
- \* Boston Resident Jobs Policy compliance
- \* Fair housing compliance
- \* Affirmative action compliance
- \* Social service provider liaison







FEASTER ENTERPRISES

- \* Conveyancing
- \* Transitional housing liaison
- \* Daycare development
- \* Social service provider liaison
- \* Affirmative action compliance
- \* Boston Resident Jobs Policy compliance
- \* Fair housing compliance
- \* Government/community relations

MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

- \* Architecture/design
- \* Urban planning

MEREDITH & GREW, INC.

- \* Financing
- \* Leasing

GASTON SNOW & ELY BARTLETT

- \* Oversee all legal aspects of development
- \* Permitting and city approvals

SUMMA ASSOCIATES, INC.

- \* Consultation on daycare facility design
- \* Daycare Operator/Vendor selection
- \* Budget development and identification of funding alternatives
- \* Daycare program philosophy, curriculum and development
- \* Evaluation Mechanism

SHELTER, INC.

- \* Transitional housing programming/provider
- \* Owner of transitional units
- \* Budget development and identification of funding alternatives

FEDERAL MANAGEMENT COMPANY, INC.

- \* Property management
- \* Training of successor management team















### 3.00 MEETING THE BRA's GOALS

#### 3.01 Introduction

The Boston Redevelopment Authority's Request for Proposal listed nine objectives and selection criteria, which each proposal should meet:

1. Addressing the needs of homeless women and children;
2. Help to provide resources to fund social services for the transitional housing participants, daycare and other public benefits;
3. Build affordable housing and provide safeguards for long-term affordability;
4. Address the need for daycare;
5. Undertake an aggressive community outreach effort to solicit input, and to fulfill the community's vision;
6. Provide opportunities for minorities and women, as well as community-based organizations;
7. Provide a quality urban design;
8. Promote housing downtown;
9. Comply with the design and development guidelines outlined in the RFP.

We have outlined in the attached section how The South Park Partnership meets these objectives and selection criteria.







### 3.10 ADDRESSING THE NEEDS OF HOMELESS WOMEN AND CHILDREN.

The tragic national and local statistics on the number of homeless women and children requires an immediate and effective response. While the evidence suggests that the number of homeless individuals will increase at an alarming rate, the response nationally has been less than adequate. The City of Boston has moved to stem the tidal wave of homelessness, which has been exacerbated by the lack of affordable housing, by including the development of affordable housing in all projects. Moreover, this proposal includes the development of transitional housing units and the development of a program for the benefit of 36 transitional families.

The South Park Partnership shares the City's concern with the issue of homelessness, recognizes its responsibility to address this issue, and supports the City's initiative. We have identified a transitional housing provider with demonstrated experience, providing important social service assistance to individuals who are in search of a more stable life environment; we propose to finance, design and construct 36 transitional housing units; we intend to fund, in part, the program of the provider, Shelter, Inc.

### 3.11 The Provider - Shelter, Inc.

Shelter, Inc. a not-for-profit agency founded in 1974, currently operates two shelter facilities in metropolitan Boston. Its Cambridge Shelter provides lodging, meals, counseling, casework and advocacy and resettlement assistance to twenty needy persons a night, as well as a long-term transitional unit at the Cambridge YWCA for single parent women and their children. Its Boston Family Shelter, located in the South End, is a transitional shelter which provides housing, meals, individual and family counseling, case advocacy and relocation assistance for eight to ten families. In 1986, Shelter, Inc. founded an affiliate educational corporation named Family Life Education, Inc. for the purpose of providing educational programs designed to assist homeless families break the cycle of poverty. The combined resources of both organizations make Shelter, Inc. uniquely qualified to operate this transitional housing program.

### 3.12 The Program

The proposed program would replicate the services currently provided at the Boston Family Shelter, but expand them to address the needs of thirty-six families rather than eight to ten families.

#### A. Program Objectives

- \* Provide an appropriate living environment.  
This can be accomplished by placing an emphasis on creating a warm, supportive and empowering environment which encourages the formation of interpersonal relationships.







- \* Support adults' re-entry into the community at large.  
This can be accomplished by educating adults with an emphasis on the development of parenting skills, and encouraging the growth of self-esteem and autonomy, and by providing professional development for parents so that they can achieve satisfying careers.
- \* Encourage effective family units to allow for the nurturing and growth of children.  
This can be accomplished by developing early intervention programs. Special services will be provided as needed for children from infancy to five years of age, with close follow-up for school age children. Support systems will be established for families to rely on when inevitable stressful situations arise.

#### B. Program Management/Staffing

A problem in providing services to transitional residents has been the lack of adequately trained staff to provide needed services. It is critical to emphasize here the importance of staffing and the necessity for creating stable connections between this program and appropriate service providers in the community. Since the Request For Proposal suggests limited on-site staffing, it will be necessary to depend heavily on support from available public and private agencies.

The program staff will consist of a supervisor with an advanced clinical degree in mental health/human services and administrative experience, six (6) facilitators with clinical backgrounds, and a secretary/office manager. Beside providing on-site coordination of services, the program staff will coordinate and monitor the delivery of services to the transitional residents by public and private agencies, and will issue service requests for proposals and written agreements, with selected agencies, detailing responsibilities with respect to placement, assessment, service delivery, relocation and case management.

#### C. Program Budget

<u>Staffing</u>	\$242,000 - \$300,000
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(1) Supervisor	
(6) Facilitators	
(1) Secretary	

<u>Office Overhead</u>	\$12,000 - \$16,000
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Utilities, Phone, Insurance	
Staff Training	

<u>Purchase of Services</u>	\$246,000 - \$334,000
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Support Services Purchased from Social Service Providers	
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Total Budget	<u>\$500,000 - \$650,000</u>
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#### D. Sources of Funds

	<u>Minimum/annum</u>
South Park Partnership Endowment	\$150,000 - \$150,000
Increases in local agency budgets (other sources)	50,000 - \$100,000
HUD Transitional Housing Demonstration Program	150,000 - 200,000
Federal and State contracts	150,000 - 200,000
TOTAL	\$500,000 - \$650,000

#### E. Program Format

##### 1. Admissions Criteria

We will attempt to ascertain the following from each client:

- a. Interest in education and career development on the part of parent.
- b. Interest in participating in pre-admissions programs (touring facility, interviews with other families, informational interviews, etc.).
- c. Willingness to address areas of alcohol and substance abuse.
- d. Interest in long-term support program.
- e. No active battering or abuse cases.

##### 2. Phase I

- a. The staff and participants will work together to establish a reasonable set of both short (2-month) and long-term goals for each individual family.
- b. The participants will be asked for feedback regarding the rules of the housing, their initial adjustment, other matters, etc.
- c. Families will be referred to community agencies to begin work on stated goals.

##### Phase II

- a. After 2 months, short-term goals will be redefined, other goals modified if necessary. Rules of the program may also be changed. Services may be added as needed.
- b. Referral to community agencies for mental health, career training, tutoring, volunteer work, and daycare will continue throughout this phase.







### Phase III

Ongoing conferences will be held with the client to evaluate progress and make any alterations that seem needed.

### Phase IV

This will begin the "termination phase" when it appears that things are going well enough for the client to begin looking for their own apartment and making the adjustment required for more independent living.

### Phase V

Clients, now living independently, remain active in the community aspects of the housing. Families who have participated in the transitional program will always have strong support and assistance from the program through any times of stress. Equally important, as lives settle down and improve outside the program, past participants can serve as role models and friends for current residents.

## 3. Client Participation

a. One weekly group meeting with residents and staff to review difficulties and program plans. This will also serve as a time to arrange for the logistics of cluster living, i.e., care of common space, babysitting.

b. Training sessions in such areas as money management, dealing with bureaucracies (i.e., AFDC or child's school) or landlord-tenant rights. Meetings should be chaired alternating between residents and staff.

c. Peer counseling training program. Since one of the major difficulties these families face is lack of support systems, it appears that interpersonal skill development is of major importance. The peer counseling program is a proven approach to teaching people to listen to others and learn about reciprocity in relationships. In addition, those trained will then be able to provide greater support to their peers entering the program. (See "Phase V").

Peer counseling will include AA, Alanon, Adult-Children. Since one of the major areas of difficulties these families face is a need to continue to participate in AA, Alanon, and Adult Children programs, groups need to be set up to address these issues.

d. Continuing participation in the transitional program will depend on residents participating in the community programs to which each family will be referred. The program will not be able to function without the participation of a network of community services and, similarly, the program cannot effectively serve its residents without their participation in these programs.







## F. Programmatic Concerns

Designing a program linking existing services to 36 transitional families, while not impossible, raises questions which we feel should be articulated here:

1. How will the continually changing mix of needed services be purchased from existing service providers? Who will pay for the services?
2. Do the community agencies have the capacity and willingness to service the needs of the transitional housing clients?
3. Who is responsible for relocation planning for the 36 families? How are relocation efforts coordinated with that of other providers involved with the families? Who is in charge of case coordination?
4. Who will be responsible for placement housing needs of former transitional housing residents? What resources will be available to assist them?

### 3.13 Linking Up With Off-Site Social Service Providers

The South End site will bring a challenge and an opportunity. The opportunity is to build a development that gracefully weaves into the fabric of the South End and is a comfortable, attractive addition to that neighborhood.

The challenge is to keep the human element high on the agenda, providing a diverse menu of social services in order to aid the new residents in their efforts to build better lives for themselves and their children.

The Partnership is aware that the best providers of services are those with a working knowledge of the area, and that most agencies cannot expand at will, no matter how worthy the project. Additional resources are usually needed. The Partnership will therefore:

- \* Follow-up on the surveying already done to determine a needed mix of services.
- \* Meet with providers who have identified themselves as interested in servicing a portion of the new population.
- \* Assist social-service providers in identifying sources of financing necessary to assist this new population.
- \* Be a resource to the Board of Directors in supplying alternatives for the Board to consider, as it develops policy for the provision of both economic opportunity and social services to residents.







The Partnership has already begun the process of identifying community-based, public and private service providers and has communicated with them regarding our interest in discussing further their ability to provide services to the expected transitional clients. A few of the agencies with whom we have communicated are:

- ABCD, Inc.
- Boston City Hospital
- Boston Employment Resource Center
- Bridge Over Troubled Waters
- Cardinal Cushing Center
- Casa del Sol
- Boston Chinese Y.E.S.
- Crispus Attucks Daycare
- Fuller Mental Health Center
- Horizons House
- Inquilinos Boricuos en Accion (IBA)
- Jobs for Youth
- Massachusetts Coalition for the Homeless
- South End Boys Club
- South End Health Center
- Transitional Employment Enterprises
- United South End Settlements
- University Hospital
- Vocational Adjustment Center
- Women, Inc.
- Women's Technical Institute
- Youth Entrepreneurial Development Project.







3.20 RESOURCES TO FUND DAYCARE SOCIAL SERVICES FOR THE  
TRANSITIONAL HOUSING PARTICIPANTS, AND OTHER PUBLIC BENEFITS.

3.21 Social Services for Transitional Housing.

- \* The South Park Partnership will provide an endowment of \$2,000,000 which will provide approximately \$150,000 per annum, as a reliable and on-going source of funds for community development and social services, or as a capital improvement fund for extraordinary operating expenses for the transitional housing project.
- \* The Partnership will provide free rent in the South End, for management of the transitional program.
- \* The Partnership will also pursue federal, state and private funds for transitional programs.

Federal

U.S. Department of Health and Human Services  
U.S. Department of Education  
Federal Emergency Management Administration  
National Institute of Mental Health  
U.S. Department of Housing & Urban Development  
(Transitional Housing Demonstration Program)

Commonwealth of Massachusetts

Executive Office of Communities and Development  
Department of Social Services  
Department of Public Welfare  
Department of Mental Health  
Department of Education  
Department of Public Health

Private

United Way of Massachusetts Bay  
Foundations  
Corporations  
Individuals

3.22 Daycare.

- \* The South Park Partnership as part of its public benefits package will assume the costs of the Summa consulting contract, to develop, model, license, and set-up both daycare centers. Both centers will then be turned over to local, community-based vendors for management.







- \* The Partnership will also pursue the following funding sources for daycare programs:

#### Foundations

Boston Foundation  
Permanent Charity Fund  
Godfrey Hyamns Trust  
Parker Foundation  
The Eastern Associated Foundation  
The Eaton Foundation, Inc.  
Fidelity Foundation  
Fuller Foundation  
Pierce Charitable Trust  
The Riley Foundation  
Sagamore Foundation  
Webster Foundation  
Noonan Memorial Fund  
IBM Corporate Foundation  
The Stop & Shop Charitable Foundation  
The Polaroid Foundation  
The Stride-Rite Charitable Foundation  
The Boston Globe Foundation  
New England Telephone Foundation

#### Other

Corporate donations  
Loans, i.e., MIFA  
United Way of Massachusetts Bay  
Other local corporations and daycare centers who might need additional space

### 3.23 Other Public Benefits.

The Partnership may use the Boston Urban Gardener program to maintain shrubbery, plants and landscaping around and on both sites, thereby providing jobs for displaced garment workers from Chinatown.

The Partnership will utilize neighborhood employees (train and hire) for jobs on-site, thereby creating employment opportunities.

The Partnership will improve and maintain the open park space around the sites, i.e., annual cleaning of statue at Park Square, seasonal plantings, on-going maintenance and evening activities.

### 3.24 Relevant Experience.

The South Park Partnership is uniquely qualified to meet this BRA objective, because:







PAM MCDERMOTT has been working with other downtown and neighborhood developers to develop creative, responsive public benefits packages, to help Boston residents. She has recently given a presentation on developer-sponsored daycare.

CHUCK GRIGSBY has expertise in developing creative financing packages for Community Development Corporations (CDCs).

JOSEPH FEASTER served on the Steering Committee, which created the child care center at the Commonwealth's Transportation Building, and was an Incorporator of that center.







### 3.30 BUILD AFFORDABLE HOUSING AND PROVIDE SAFEGUARDS FOR LONG-TERM AFFORDABILITY

#### 3.31 Program.

The Partnership will provide for 10% of affordable housing units on the Park Square site (15), and 24 on the South End site, in addition to the 36 transitional units.

\* The Partnership will include deed restrictions in all Purchase and Sale Agreements to safeguard the long-term affordability of these units.

#### 3.32 Funding.

\* The Partnership will provide up to \$5,000,000 from the Park Square site to subsidize construction of the South End site.

\* The Partnership will pursue other funding sources for construction to include:

- The State's Housing Innovations Fund administered by the Executive Office of Communities and Development (EOCD).
- Other programs funded and administered by EOCD which foster home ownership especially by first-time homebuyers.
- Massachusetts Housing Finance Agency programs designed to foster first-time home ownership, for low to moderate income purchasers.
- The Boston Housing Authority under section 705 or 689, if applicable.

#### 3.33 Policy on Fair Housing

The team's commitment to a fair housing policy will be tangible and measurable. Team members individually have already demonstrated a commitment to these principles in their other projects and involvements.

The Partnership's policy will include:

\* A firm commitment to comply with city, state and federal rules, orders or regulations barring discrimination of any person or group on the grounds of race, color, religion, age, sex or national origin.

\* A firm commitment to comply with the letter and spirit of city, state and federal policies requiring administration of programs and activities relating to housing in a manner to affirmatively further fair housing.

\* A firm commitment to comply with the city, state and federal prohibitions against discrimination, based on handicap.

The Partnership intends to take a pro-active stance on this issue, as on other similar matters. In addition to steps of compliance, we will take the following additional steps:







- In making known the availability of housing at both the Park Square site and the South End site, we will establish additional procedures when the usual, intended procedures are unlikely to reach persons of any particular race, color, religion, sex or national origin who may qualify for purchase or tenancy.
- In conjunction with one or more local social service providers, the Partnership will sponsor home ownership seminars for potential buyers, with plain explanations of the mechanics of home buying and the how-to of financing. We will seek the cooperation of local banks to participate in these seminars. An added benefit may be the continuance of such seminars by the social service agency to benefit other projects.
- Again, in conjunction with one or more local service providers, seek the cooperation of vocational school volunteers and occupational education instructors, as well as home building material retailers to conduct on-site seminars on the basics of home repair: how to perform minor repairs until a professional tradesman is available or needed.
- The Partnership will insure that events, seminars and information are provided in bilingual form, in order to insure the widest dissemination.

### 3.34 Relevant Experience

The South Park Partnership is uniquely qualified to meet these BRA objectives, because:

o SCHOCHET ASSOCIATES has an established track record of developing high-quality, reputable, affordable housing across the entire country. For example:

- Waterview Apartments, 49 units, South Boston
- Danforth Heights Apartments, 166 units, Portland, Maine
- Thayer Garden Apartments, 96 units, Waterville, Maine
- Cotton Mill Apartments, 55 units, Whitinsville
- Weldon Apartments, 105 units, Greenfield
- West Broadway Apartments, 115 units, Newport, Rhode Island
- Angelus Plaza, 1098 units, Los Angeles, California
- Fresh Pond Apartments, 504 units, Cambridge

o PAMELA MCDERMOTT, as a community relations consultant to the 125 Summer Street project, helped to initiate Boston's first linkage housing creation proposal. The affordable housing will be built by a joint venture of the development team and the Chinese Consolidated Benevolent Association (CCBA), and will be constructed on Shawmut Avenue in the South End.







o CHARLES GRIGSBY, as President of the Massachusetts Community Development Finance Corporation has supervised investments in over 34 real estate projects, most of which entailed low and moderate income housing. These investments have created over 1500 new or rehabilitated units for low and moderate income tenants through CDCs. Investments have included a transitional housing site in Fitchburg for 8 females and their children. As President of the Massachusetts Venture Capital Corporation, he made equity and subordinated investments to enable a minority developer to rehabilitate over 300 units of low and moderate income housing. These investments were early demonstrations of the feasibility of converting surplus school buildings into affordable housing.

o Mintz Associates has an established track record of designing high-quality, affordable housing in Boston, and Massachusetts. For example:

- Charlesview Apartments, 212 units, Allston
- Shore Plaza East, 381 units, East Boston
- Over 200 units of rehabilitated housing in the South End and Worcester
- Heritage Elderly Apartment Complex in Maverick Square, East Boston
- Knights of Columbus Elderly Housing, 150 units, North End
- Patricia Hagen White Apartments, 225 units, Brighton
- South Cove Plaza East and West Elderly Housing, 231 units, Bay Village
- Columbia Point, 449 units, Dorchester

o Shelter, Inc., in operation since 1974, developed and currently operates two transitional housing facilities in metropolitan Boston for a total of 55 people.







### 3.40 ADDRESS THE NEED FOR DAYCARE

Child care has become one of the most important issues facing American families today. Significant social, economic and demographic changes have placed women with young children into the work force and has made locating quality, affordable child care a considerable problem for working parents. Single-parent households and dual-career families have increased so dramatically that by 1990 approximately 60% of preschoolers will have mothers who work outside the home. In addition, the accelerated child care needs of the general population further magnifies the need for high quality child care within any community, especially in urban localities.

Efforts such as the Parcel to Parcel Linkage Project for Park Square and the South End point to the fact that the City of Boston is actively attempting to address the problems of the homeless and those in transitional housing and to provide much needed child care for these individuals. Child care at the downtown site directly impacts on the lives of working parents in the City.

### 3.41 The Providers - Summa Associates, Inc./Local Providers

The South Park Partnershipment intends to ensure the success of the two daycare centers outlined in the RFP. To that end, we conducted an exhaustive survey of government and corporate opinion-leaders in Boston and Massachusetts to elicit their thoughts on potential service agencies, vendors and consultants. Summa Associates, Inc. was the overwhelming choice of a majority of those individuals we contacted.

Summa Associates, Inc. is the first national consulting firm specializing in corporate child care. It was formed in 1986 through a merger of three regional firms: Burud and Associates of Los Angeles; Contemporary Ventures in Child Care of Phoenix; and Corporate Child Care Consultants of Boston.

We have conducted an exhaustive analysis, and have already met with and written letters to, local community based daycare providers, to ensure their input and interest.

### 3.42 The Program

The proposed project for the Parcel to Parcel Linkage Project is to plan, develop and implement high quality affordable on-site child care centers for the future residents and for potential community members, as well, at the South End and Park Square development sites.

The proposed approach involves facility design, program development, budget development, identification of additional funding sources and program evaluation. We will offer assistance in all phases of planning and development, including the recruitment of operators and the licensing of the centers, as well as creating an evaluation mechanism to insure the continued success of the program.







Summa's approach is supported by its ability and experience in programs of this nature and its ability for providing comprehensive consultation and planning. The approach is summarized in the Overview of Approach on the following page and is explained in detail in this proposal.

#### DAY CARE COMPONENT OF PROJECT

- Goals:
- \* To establish a model on-site child care center for the residents of the South End transitional housing program as well as potentially for children from South End neighborhood families for approximately 45 children and another center at the Park Square downtown development site for children of residents and working parents in the area. This center will also be for approximately 45 - 50 children.
  - \* To provide female heads of households the daycare support they need for their children in order to become financially independent.
  - \* To provide quality child care that is convenient and affordable.

Summa Associates' responsibilities for this project will be:

#### A. Consultation on Facility Design both Interior and Exterior

Summa Associates will evaluate the proposed site, both indoor and outdoor space, and make recommendations as to facility design to meet code requirements for Office For Children licensing, recommend a list of furnishings, equipment and materials required to conduct a quality program, work closely with the architects in all phases of the design process and develop a Design Guide for the architects on the project to use in developing plans for the centers.

The design guide includes the following:

1. Description of the Program goals and philosophy
2. Review of all state regulatory requirements for child care facilities
3. General design criteria for:
  - Classroom space
  - Outdoor play yards
  - Site design and development
  - Maintenance/utility space
  - Plumbing
  - Indoor/outdoor equipment storage
  - Food preparation area
  - Office/staff areas
  - Laundry areas
  - Surfaces







#### 4. Listing of all classroom furniture.

##### a. Classroom composition:

Infants - 6 weeks to 18 months  
Toddlers - 18 months to 2.9 years  
Preschoolers - 2.9 to 6 years

The Office for Children requires 35 square feet per child of indoor space, excluding storage, kitchen, bathrooms and hallways. Each class room requires an eating area, play area, space for napping, storage, sink, and easy access to a children's bathroom. In addition, infants and toddlers require a diapering area.

Based on the groupings described above, Summa will recommend the necessary square footage for each classroom. At least 50 square feet should be allocated for each child. Room for infants, toddlers, and pre-schoolers needs to be allocated. Additional spaces include kitchen and laundry, administrative areas, isolation area, bathrooms (adult and child) circulation and storage, extra room (quiet room or common area - optional).

Other possible amenities would be the inclusion of (i) a large play area for indoor gross motor activity; and (ii) a wet room for painting and messy play. Multi-levels and platforms should also be included in the design.

##### b. Outdoor space requirements

The Office for Children requires 75 square feet of outdoor space for each child using the playground at any one time. Parking spaces for drop-off and pick-up also need to be allocated. Outdoor play yards include climbing structures, sand area, bicycle path, shed for equipment and other areas dependent on size and design.

#### B. Operator/Vendor Selection

Summa Associates will assist in the process of selecting a potential vendor(s) for both centers. Criteria will be developed for operator selection, and potential operators will be recruited and interviewed. This necessitates being aware of and involved with the operators of neighborhood child care centers who provide quality care and would have the potential interest and capabilities to administer these programs. The team has already consulted with several area providers.

#### C. Development of Budgets and Identification of Funding Alternatives

Summa Associates will advise on budgetary procedures and prepare budgets and spreadsheets for the proposed centers. Start-up costs include the following:







Capitalized Expenses:

- Construction
- Contingency
- Architectural Fees
- Equipment, including classroom, office, kitchen, outdoor

Non-Capitalized Expenses

- Consultant Fees
- Start-up Salaries
- Materials - Classroom
- Food and Supplies
- Other Fees, i.e., legal, insurance, publicity

D. Program Philosophy, Curriculum and Development

Summa Associates will assist the vendor selected in operating this program and in program development. They will assist in establishing program philosophy and curriculum, and in writing all policies, procedures, handbooks and forms.

E. Evaluation Mechanism

Summa Associates will design an evaluation mechanism to insure the ongoing quality and success of the centers.







PROPOSED START-UP BUDGET

DAYCARE CENTER  
(45 - 50 children)

Construction:		
Interior Walls	\$20,000	
Carpeting	17,000	
Painting	15,000	
Plumbing	25,000	
Kitchen (sink, stove, refrigerator, dishwasher, cabinets, washer/dryer)	25,000	
General Mill Work and Carpentry	56,000	
Lighting	20,000	
Miscellaneous	18,000	
Contingency	19,600	
Total Construction Costs		\$215,600
Outdoor Play Space:		
Climbing Structures	\$20,000	
Fencing	12,000	
Grading and Surfacing	15,000	
Other Equipment	10,000	
Total Outdoor Play Space		\$ 57,000
Classroom Equipment and Materials:(4 classrooms)		
Equipment and Furniture	\$60,000	
Educational Materials and Supplies	25,000	
Total Classroom Equipment and Materials		\$ 85,000
Office Equipment and Supplies	\$12,000	
Kitchen Equipment and Supplies	5,000	
Total Equipment and Supplies		\$17,000
Administrative Expenses:		
Director Salary - 3 months	\$ 6,000	
Fringe Benefits @ 21%	1,260	
Staff Orientation	2,400	
Printing and Copying	1,500	
Advertising	1,500	
Marketing	2,000	
Insurance Prepayment	6,000	
Other Fees	500	
Telephone and Postage	500	
Total Administrative Expenses		\$21,660
TOTAL START-UP COSTS		\$396,260







PROPOSED YEARLY OPERATING BUDGET

Payroll: Salaries (4 classrooms - 48 children)

Director	\$ 25,000
2 Head Teachers @ \$18,000	36,000
5 Teachers @ \$16,000	80,000
6 Assistant Teachers @ \$13,000	78,000
Substitutes	9,000
Secretary/Bookkeeper - Parttime	15,500
Social Worker - Parttime	16,800
 TOTAL SALARIES	 260,300
Benefits @ 21%	52,060
 TOTAL PERSONNEL	 312,360
 Food	 4,000
 Equipment	 3,500
 Materials and Supplies:	
Classroom	2,500
Kitchen	1,000
Office	2,000
 Health Services	 2,000
 Insurance	 6,000
 Publicity	 1,500
 Staff Development:	
Training	2,000
Membership and Conferences	2,000
 Telephone and Postage	 2,000
 TOTAL COSTS	 \$340,860

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Does not include rent, utilities, maintenance  
Average cost of care per child \$147.94







### 3.50 UNDERTAKE AN AGGRESSIVE COMMUNITY OUTREACH EFFORT TO SOLICIT INPUT, AND TO FULFILL THE COMMUNITY'S VISION

To be successful, any development project must accurately incorporate the vision of it's host community resulting in an improved community living environment for existing residents as well as a high quality environment for the new neighbors.

The City, through the BRA, has succeeded in describing a project that will meet those objectives as well as incorporate the badly needed and innovative component of transitional housing.

The South Park Partnership, upon designation, intends to complete the task of realizing this unique combination of innovation and community improvement and growth.

### 3.51 Goals

One important component of that task will be an aggressive community outreach program. The goals of that outreach will be twofold:

1. To work in cooperation with the Mayoral appointed Board of Directors to stay close to the community vision that has shaped this project in a way that is beneficial to all. We would accomplish this by initiating meetings with abutters, neighborhood associations, CDC's and residents to continually stay tuned to concerns and advice. We will help foster the continued involvement of the working group of community-based social service providers who provided input to develop the proposal for the South End site. These meetings should be regular, responsive and open.

2. To identify the services needed by the transitional residents of the development and to specifically identify the social service providers who are interested in delivering those services. Meetings with local agencies must be frank and decisive. Agencies cannot afford to immediately service a new population without planning, cooperation, and support and assistance in gaining new funding to support additional capacity.

### 3.52 Community Benefits

Through this outreach process, the Partnership will articulate community benefits that they will provide such as:

- \* The Partnership will aggressively pursue neighborhood residents for all construction and permanent jobs on both sites, to include the neighborhoods of Chinatown, the South End, Bay Village and Park Square.
- \* Both daycare centers (Park Square and South End) will be open to neighborhood residents.
- \* Parking on the South End site will be FREE, in a protected, well-lit, underground garage.







- \* The Partnership will improve and maintain the open space and gardens on both sites.
- \* The Partnership will promote an active, safe streetlife on both sites, encouraging evening activities, i.e., concerts, retail and restaurant siting on the Park Square site, and prominent lighting on the South End site.
- \* Because of the Park Square project's proximity to Boston's new Cultural District, every effort will be made to incorporate some cultural facility/program.

### 3.53 Relevant Experience

- o The South Park Partnership is uniquely qualified to meet this BRA objective, because:
  - \* PAM McDERMOTT has been providing this level of community outreach to the clients of her firm for years. This specialized ability to seek input, capture its essence and respond to it is one of the trademarks of Northeast. Her firm has worked in this capacity with elected officials, community, civic, and historical groups, abutters and government agencies. In her role as a consultant to 125 Summer Street, she spent considerable time researching and analyzing the needs of Chinatown. Her firm, Northeast Management & Marketing Company, has also been responsible for the development of other creative public benefits packages to benefit neighborhood residents. Pamela McDermott also serves on the Boston Landmarks Commission, and has oftentimes dealt with the complexities of protecting open space.
  - \* CHARLES GRIGSBY is a neighbor of the South End site and no stranger to community ascertainment issues and methods. His work in the early 70's contributed to the development of citizen advisory capacity in the South End. His Chairman's role in the State Board of Education and the Urban League of Eastern Massachusetts equip him with the experience to design and promote community outreach.
  - \* JOE FEASTER has been deeply involved in both the legal aspects of real estate development and issues of equity in housing for many years. He has had to learn firsthand the concerns and aspirations of community people to enable him to co-draft the Executive Orders surrounding the minority development program and amendments to the Code of Fair Practices. Additionally, his prior leadership of the NAACP and the Greater Boston Civil Rights Coalition required listening, learning, and subsequent action based on community outreach.
  - \* Jay Schochet and Sy Mintz have both worked in the Park Square "neighborhood", and know the needs of that section of Boston.







### 3.60 Provide Opportunities for Minorities and Women, as Well as Community-Based Organizations

By definition, the Partnership is committed to the goals of increased access to economic opportunities for women and minority owned firms, and to assist community based organizations in providing a wider range of services as needed. The fact that the Partnership is comprised significantly of women and minority owned firms demonstrate that commitment.

### 3.61 Access to Work

There will be at least two stages of opportunity for women and minority firms to gain access to work.

The first stage will be after designation and in the pre-construction and construction period. Minority bidder lists and city and state certification programs will be used as one way to identify firms which may want information about these opportunities. Substantial outreach is needed to insure that potential bidders are informed in sufficient time to prepare and submit their best bid for the work in question. The Partnership will perform that outreach. Employment policies spelled out in the Policy on Employment will be followed and required of contractors and subcontractors.

The second stage of opportunity occurs after construction, and involves the retail and business tenancy of the Park Square site, as well as the goods and services needed by the South End site. Maximum effort will be expended to insure that persons have an opportunity to gain access, who have been previously underrepresented.

### 3.62 Employment Policies

The employment practices of each South Park Partnership team member reflects a commitment to "inclusionary hiring". The employment practice of seeking women, minorities, and Boston residents is a policy that we need only expand upon and improve for this project, not learn here and espouse for the first time.

The South Park Partnership policy on employment will:

- \* Observe both the letter and spirit of legal requirements relating to nondiscrimination, equal employment opportunity, contract compliance, and affirmative action.

- \* Require the contractor and sub-contractors to comply with guidelines that the employee composition include at least 50% Boston residents, at least 25% minority persons, and at least 10% women.

- \* Require tenants to use good faith efforts to comply with "Boston for Boston" guidelines that 50% of all permanent jobs be held by Boston residents, 25% by minorities, and 10% by women.







\* Establish a goal of awarding not less than 10% of the general contractor's bid price for minority and women business participation.

### 3.63 Relevant Experience

Members of the team have unparalleled experience at developing small businesses. That experience will be put to work in specific ways to promote minorities, women and small non-profit organizations.

\* A project clearinghouse will be established to assist women and minority owned firms in locating the technical assistance often required in getting established initially, or for growth.

\* Financing alternatives will be outlined using the principals' working knowledge of how state and city lending programs work, and how to meet the relevant criteria. Often it is the presentation that loses the financing and not the facts.

\* In bringing their experience to bear, the Partnership makes it clear that it will, wherever possible, work with and through local service providers in order to strengthen their capacity to deliver, and avoid duplication or "re-inventing the wheel".

\* Other relevant expertise of the Partners is outlined in our Introduction - Section 2.20.







### 3.70 PROMOTING QUALITY URBAN DESIGN

#### 3.71 Park Square Parcel

The Park Square parcel is strategically located at the confluence of Stuart Street, Charles Street South, and the downtown end of Columbus Avenue. In urban design terms, development of this parcel can contribute to making a comfortable transition from the 250-foot tall, rather massive Howard Johnson's Hotel, to the new, more moderate height of the Four Seasons Hotel and its Park Square Plaza open space, as well as, the adjacent Lincoln Statue. Development on this parcel can also relate to other important building massing-heights, such as the Park Plaza Hotel-Office Building, the Four Seasons Hotel, and the currently under construction Heritage-on-the-Common, all of which reach 155 feet as their maximum heights.

Other important building massing-heights include the State Transportation Building, the stepped-down portion of the Four Seasons Hotel at approximately 125 feet in height, and lower scale buildings, such as the Motor Mart Garage, the HoJo-57 Garage, the stepped-down portion of the State Transportation Building, and the existing row of buildings at the corner of Boylston Street and Charles Street South.

Our proposal responds to the mixed-use character of this Downtown-Park Square neighborhood with the substantial infusion of residential ownerships, a portion of which is affordable; and by placing active retail space and a child care center on the ground floor; with the second, third and fourth floors devoted to office use; and the fifth through the fifteenth being residential. The combination of these uses should substantially contribute to the life, activity and safety of this important downtown neighborhood.

Some important building design aspects include: the integration of stone and brick masonry facade materials reflecting the character of other buildings in the Park Square area; the stone cornice banding at the fifth floor reflecting a change in use from office to residential; as well as other stone cornice bandings at the tenth floor emphasizing the 95 foot break; and at the thirteenth floor emphasizing the 125 foot break; and finally at the roof which is 155 feet, the introduction of bay windows, french type balconies and stone banding, adding to the three dimensional richness of the facade as well as, providing side and oblique views of the plaza in Park Square, the Boston Common and Public Gardens; and the penetration through the ground floor of the building of a mini-arcade connecting Charles Street South with Park Plaza, and vice versa.

In addition, we have created a variety of one, two and three bedroom units to appeal to a variety of users, both in the market rate and affordable categories. The integration of below-grade parking discretely entered and exited from Stuart Street; and finally, the treatment of the ground plane, especially the 35-foot wide service easement between this parcel and the Motor Mart Garage, with brick and granite paving, street trees, lighting and benches.







### 3.72 The South End Parcels

The South End parcels present an urban design challenge of how to integrate high density housing, with auxiliary parking, along with the special need of discretely integrating transitional housing within a total quality living environment that is characteristically "South End."

From an urban design standpoint, the buildings are placed along the edges of the three streets (Washington, West Concord, and Rutland) and the parking is placed unobtrusively below-ground under the buildings, leaving the ground and first floor of the unit a half level up from the sidewalk. The open space created between the buildings is an amenity for the development's housing users, as well as the residents in the abutting existing housing on Shawmut Avenue.

The scale of the building masses reflects the variety of modest height buildings in the South End. The slightly taller mass faces Washington Street, then turns at both corners, finally stepping down one story relating to the lower height of abutting buildings on Shawmut Avenue. A six-unit building fills in the missing tooth at the southeast corner of Shawmut Avenue and Rutland Street, and a two-story child care center adjacent to the Community Gardens, with its outdoor play space in the rear, completes the block.

The housing scheme we developed represents the desire to integrate transitional housing with moderate and market rate housing, in such a way as to not draw attention to the transitional housing. To create the kind of housing that best fulfills the needs of the transitional client, yet in appearance is no different than typical South End housing, is accomplished by creating four transitional housing clusters, two at the ends of the building on Washington Street and one building each on Rutland and West Concord Streets. These transitional units are walkup flats with their own entryway coming up directly from the sidewalk. Each of the four clusters also has common space. The majority of moderate and market rate units are duplexes and are reached by two mini-elevator cores off Rutland and West Concord Streets. Upon arrival at the fourth floor, there are short glass bridges connecting to single-hooded corridors, off which are the entry doors to the apartment units. There are also moderate and market rate walkup flats on all three streets, similar in appearance to the transitional units.

The buildings are characterized by bow and bay-shaped windows, some in masonry, others in wood, and while we have strived to maintain the South End character, we have also tried to give a somewhat contemporary appearance to the buildings, all within the framework of recognizing the cost constraints of producing quality, affordable housing.







### 3.80 PROMOTING HOUSING DOWNTOWN

The vision of more people walking to their place of employment, and living near the restaurants, stores and Boston's entertainment and cultural centers is a vision which The South Park Partnership hopes to make a reality. Our proposed 146 condominium units on the Park Square site with 15 being low and moderate income, is consistent with the City's and the Boston Redevelopment Authority's efforts to further the revitalization of the City by establishing downtown neighborhoods. Auxiliary benefits derived by the creation of downtown neighborhoods will be:

- o less traffic congestion with people walking more rather than driving

- o increased usage of public transportation - less use of automobiles

- o expanded market for downtown restaurants, stores and entertainment establishments, particularly in the evenings

- o heightened sensitivity to crime resulting in the creation of neighborhood watches, more street lighting and cooperation with the police department

- o additional housing units to reverse the undersupply of available housing.

The South Park Partnership has evidenced its commitment to help the City in its revitalization efforts by proposing to construct significantly more residential units than proposed in the Request for Proposal.







3.90 COMPLY WITH THE DESIGN AND DEVELOPMENT GUIDLINES OUTLINED IN  
THE RFP

The South Park Partnership has submitted a proposal that not only complies with the intent of all design and development guidelines outlined in the RFP, but takes many of the ideas one step further. As stated, we have a long-term commitment to and interest in the City that provides the initiative to develop top-quality projects, with exhaustive and aggressive community benefit programs.















4.00 EQUITY PARTICIPATION/DISCLOSURE STATEMENT/STATEMENT OF INTENT

4.10 Equity Participation







## MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING is made and entered into as of this 2nd day of November, 1987, by and among Schochet Associates ("Schochet"), Charles Grigsby ("Grigsby"), Feaster Enterprises ("Feaster"), Northeast Management & Marketing Company ("Northeast") and Samuel E. Mintz ("Mintz") (collectively, the "Partners").

WHEREAS, the Partners have devoted, and intend to devote, substantial time, efforts and money to respond to a request for development proposals issued by the Boston Redevelopment Authority ("BRA") for the Park Square Parcel and the South End Transitional Housing Parcel in Boston, Massachusetts, and more particularly described in Exhibit A hereto; and

WHEREAS, the Partners desire to develop the subject land consistent with the development guidelines issued by the BRA; and

WHEREAS, the Partners desire to confirm their understanding regarding such proposed development;

NOW THEREFORE, the Partners, for good and valuable consideration, the receipt of which is hereby acknowledged, agree as follows:







1. Formation of Entity. The Partners hereto agree that they will form a partnership (general or limited) or some other entity (the "Partnership") which shall own the development and purchase or lease rights to the subject land.

2. Ownership of Entity. The ownership of the Partnership shall be as follows:

Schochet	51.00%
Grigsby	13.07%
Feaster	13.07%
Northeast	13.07%
Mintz	9.79%

3. Capital Contributions. The Partners (other than Mintz) shall provide cash capital contributions to the Partnership, such cash capital contributions to be payable on demand, in order to provide funds for all of the initial engineering, architectural, legal, administrative, and other costs involved in securing appropriate governmental approvals, leasing and financing for the proposed development. It is the understanding of the Partners that each of them shall make capital contributions through submission of a development proposal in accordance with the following percentage allocations:

Schochet	56.53%
Grigsby	14.49%
Feaster	14.49%
Northeast	14.49%

4. Other Contributions. Each Partner will contribute his/its time to the Partnership at no cost (through project construction start) with the exception of Mintz, who will be paid for his services consistent with the attached letter agreement (Exhibit B). An outline of the Partners' responsibilities is attached as Exhibit C.







5. Withdrawal or Expulsion of Partners. In the event a Partner desires to withdraw from the Partnership or fails or refuses to perform his/its responsibilities under this Memorandum as determined, in good faith, by three of the other intended general partners (see Paragraph 6 below), then his/its interests shall revert to the other Partners in proportion to his/its percentage ownership as stated in paragraph 2.

6. Formal Agreement. Upon official designation as Developer by the BRA, the Partners agree to enter immediately into good faith negotiations for the preparation and signing of a formal partnership agreement (general or limited) or other agreement which will incorporate the terms of this Memorandum, such formal partnership agreement (general or limited) or other agreement to be signed within thirty (30) days from such designation, unless otherwise extended by agreement of all the Partners. It is expressly acknowledged and agreed by all Partners that their present intention is to enter into a limited partnership agreement and that Mintz shall be a limited and not a general partner.

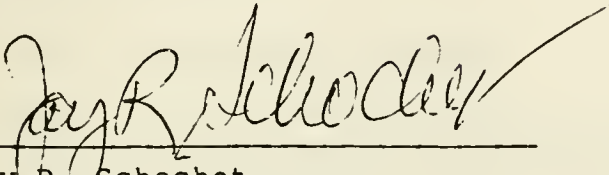




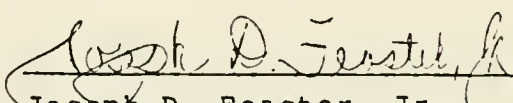


IN WITNESS WHEREOF, the Partners hereby execute, under seal, this Memorandum of Understanding on the date first above written.

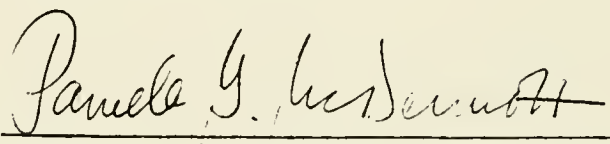
SCHOCHET ASSOCIATES


  
\_\_\_\_\_  
Jay R. Schochet  
Its Sole Proprietor

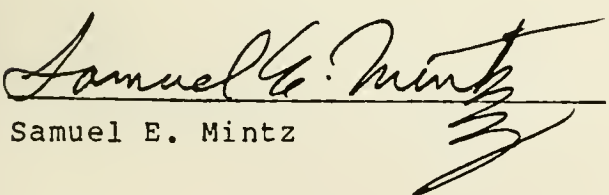
FEASTER ENTERPRISES

  
\_\_\_\_\_  
Joseph D. Feaster, Jr.  
Its President

NORTHEAST MANAGEMENT &  
MARKETING COMPANY

  
\_\_\_\_\_  
Pamela G. McDermott  
Its President

  
\_\_\_\_\_  
Charles Grigsby

  
\_\_\_\_\_  
Samuel E. Mintz







4.20 PUBLIC DISCLOSURE/STATEMENT OF QUALIFICATIONS AND  
FINANCIAL RESPONSIBILITY

We have been advised by Nancyellen Hayes that the appropriate forms will be provided by the BRA, for submission at a later date. Personal corporate financial statements will be furnished upon request. We appreciate the BRA holding them confidential.

4.30 STATEMENT OF INTENT

The South Park Partnership agrees to comply aggressively with the City of Boston's Fair Housing and Employment Plans, and to prepare an affirmative marketing plan so that our projects will reflect the diversity which exists in the City.















## 5.00 DEVELOPMENT PROPOSALS

### 5.10 Project Summary

### 5.11 Park Square Site

The following tables analyze the Park Square site. We propose to construct a mixed-use building with approximately 300,200 square feet of space including 22,000 square feet of retail and a 3,000 square foot daycare center on the first floor, 90,000 square feet of first-class office space on the second through fourth floors, and 146 condominium units on the upper floors. Two below grade levels contain approximately 265 parking spaces. These levels are proposed to extend beneath the thirty-five foot pedestrian and service way and parkland adjacent to the re-use parcel.

SITE ANALYSIS - PARK SQUARE	
	Area (SF)
City of Boston	25,400
Private Ownership	12,400
Total Area	37,800
Floor Area Ratio (FAR)	8
Total Buildable Area	302,400

PROJECT DESCRIPTION - PARK SQUARE			
Use	Units	Area Per Unit	Gross Building Area
Office			90,000
Retail			22,000
Day Care			3,000
Residential	146	1,200	175,200
Parking			
Office	60		
Retail	15		
Residential	190		
Total	265	325	86,060
Mechanical and Service			10,000
Total Building Area			386,260
Total Area w/o Garage			300,200







## 5.12 South End Sites

The following tables analyze the South End sites. We propose to construct 90 units (36 transitional, 24 moderate-income, and 30 market-rate) plus space for Community Service and a daycare facility. Approximately 70 parking spaces will be located below grade.

### SITE ANALYSIS - SOUTH END

	Area (SF)
City of Boston	56,000
Private Ownership	0
Total Area	56,000
Floor Area Ratio (FAR)	2
Total Buildable Area	112,000

### PROJECT DESCRIPTION - SOUTH END

Use	Units	Area Per Unit	Gross Building Area
Residential			0
Transitional	36	1,125	40,500
Moderate-income	24	1,125	27,000
Market-rate	30	1,125	33,750
Total	90		101,250
Support Services			
Community Services			3,000
Day Care			3,000
Total			6,000
Parking			
Residential	63		
Support Services	7		
Total	70	375	26,250
Total Building Area			133,500
Total Area w/o Garage			107,250







=====

CONDOMINIUM BREAKDOWN - PARK SQUARE

=====

Assumed Building Efficiency Factor      88.00%

=====

Description	Number of Units	Unit Gross Area	Total Gross Area	Unit Net Area
Market Rate				
One Bedroom	32	950	30,400	836
Two Bedroom	68	1,220	82,960	1,074
Three Bedroom	31	1,420	44,020	1,250
	-----		-----	
Total	131		157,380	
Moderate Income				
One Bedroom	4	950	3,800	836
Two Bedroom	8	1,220	9,760	1,074
Three Bedroom	3	1,420	4,260	1,250
	-----		-----	
Total	15		17,820	
Total Units	146		175,200	
Average Units		1,200		1,056

=====

Ten per cent of the one-, two-, and three-bedroom condominium units are set aside for moderate-income families. The final breakdown of unit sizes may be adjusted as the result of a formal market study. The total number of units may decrease if the market demands larger units or units with architectural amenities such as double-height spaces, study alcoves, duplexes, etc. The architectural drawings included in this proposal do not address these marketing issues or the preference to minimize corridor lengths.

The South Park Partnership suggests that the potential exists to coordinate this development with changes to the Motor Mart Garage. While we have been unable to initiate discussions with either the owner or lessor of this facility, it could be beneficial to review possible air-rights development and coordinated facade treatment.







=====

CONDOMINIUM BREAKDOWN - SOUTH END

=====

Assumed Building Efficiency Factor      88.00%

=====

Description	Number of Units	Unit Gross Area	Total Gross Area	Unit Net Area
Market Rate				
One Bedroom	2	875	1,750	770
Two Bedroom	21	1,075	22,575	946
Three Bedroom	7	1,275	8,925	1,122
Total	30		33,250	
Moderate Income				
One Bedroom	2	875	1,750	770
Two Bedroom	17	1,075	18,275	946
Three Bedroom	5	1,275	6,375	1,122
Total	24		26,400	
Transitional				
One Bedroom	0	0	0	0
Two Bedroom	24	1,075	25,800	946
Three Bedroom	8	1,275	10,200	1,122
Four Bedroom	4	1,400	5,600	1,232
Total	36		41,600	
Total Units	90		101,250	
Average Units		1,125		990

=====

Forty-four per cent of the non-transitional units have been set aside for moderate-income families. Unit sizes are comparable for market rate, moderate-income, and transitional units. The final unit breakdown may be adjusted during program refinement, but the intent is to create as many large family units as possible.

The Partnership feels the demand exists for a larger daycare center than the Request for Proposals contains. We would hope this issue would be open to additional discussions.







## 5.20 Project Ownership

Both project sites will be developed by The South Park Partnership which is a Boston based partnership consisting of general partners (Schochet Associates, Northeast Management and Marketing Company, Charles Grigsby, and Feaster Enterprises) and a limited partner (Samuel E. Mintz). The partnership will retain ownership in the commercial portions of the Park Square project and the daycare center to be constructed in the South End (although this facility could be turned over to a non-profit agency). The residential components of both project components will be sold to individual unit owners. The transitional housing units are proposed to be divided between the Boston Housing Authority (which will be requested to purchase twelve of the units under the Commonwealth of Massachusetts Section 705 program) and Shelter, Inc. (which will purchase the remaining twenty-four units for \$1.00 each). All revenues received for transitional housing units under rent subsidy programs shall be available to offset project operating expenses and debt.

The commercial portion of the Park Square project will be managed by Federal Management Company, Inc., the Property Management affiliate of Schochet Associates. Federal Management will also initially manage the residential property (possibly including the transitional housing units), but will train a local management company (or companies) to manage the properties, if requested.





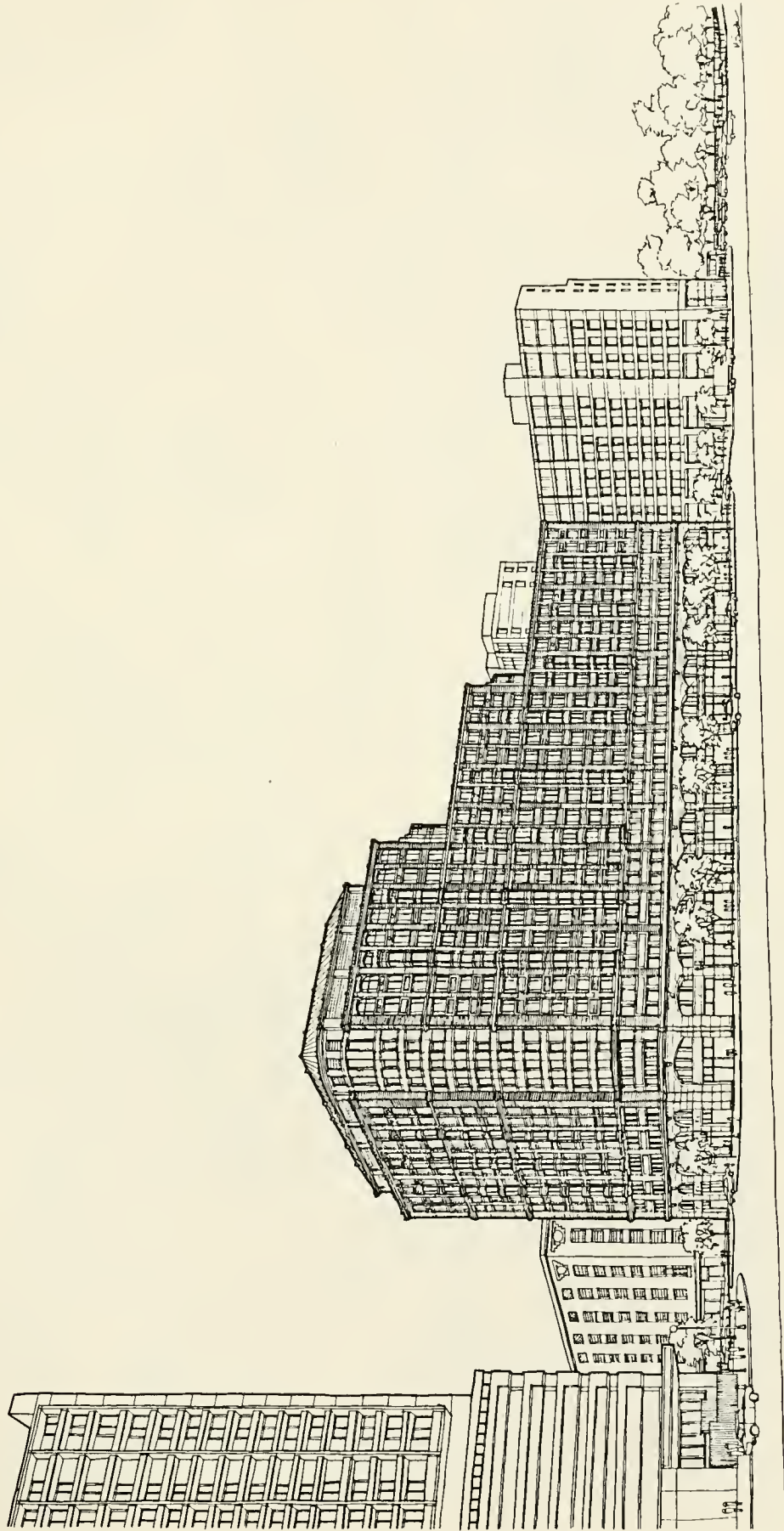












PERSPECTIVE VIEW  
FROM CORNER OF  
CHARLES AND STUART STREETS

PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

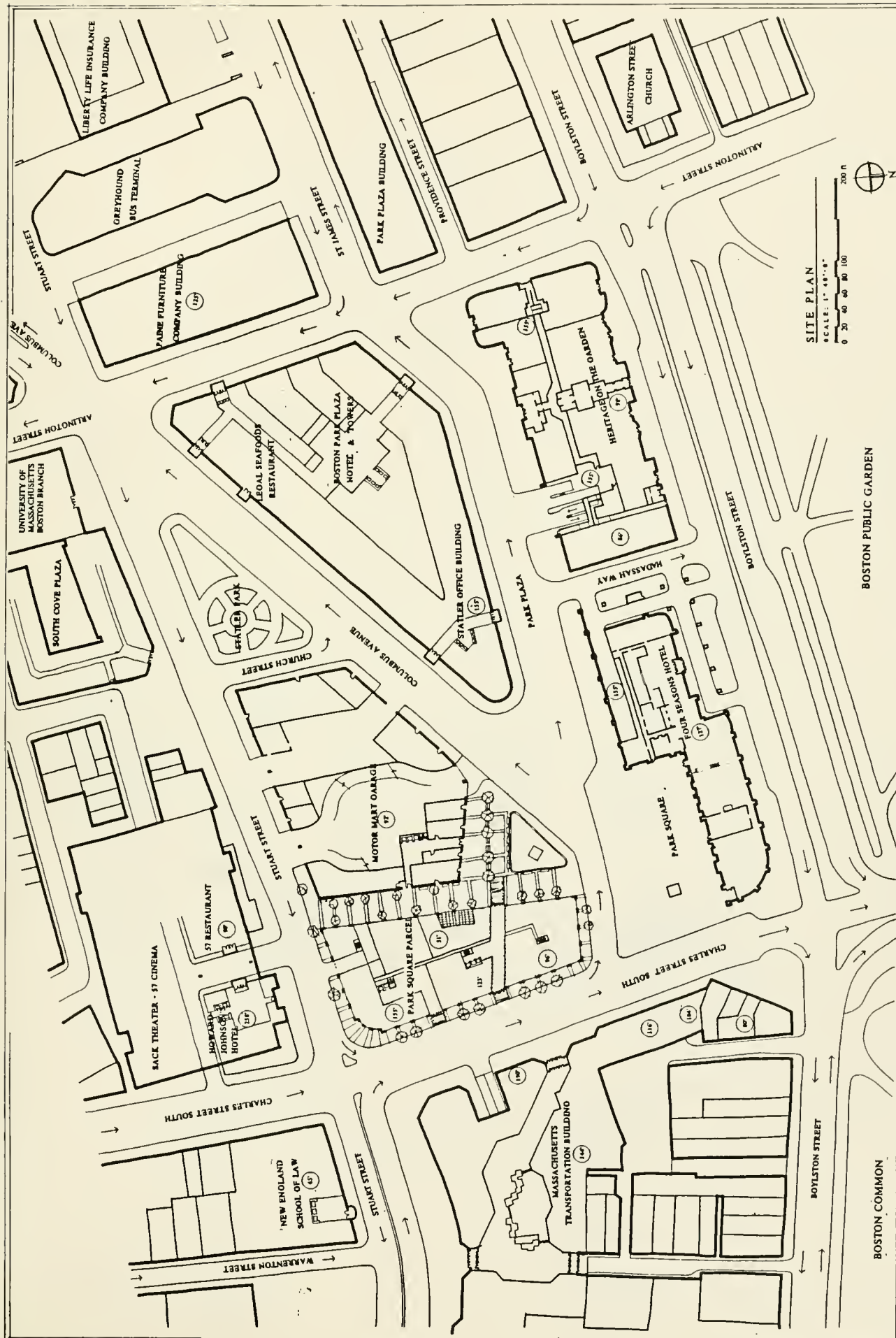
DEVELOPER: THE SOUTH PARK PARTNERSHIP

ARCHITECTS: MINTZ ASSOCIATES









PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

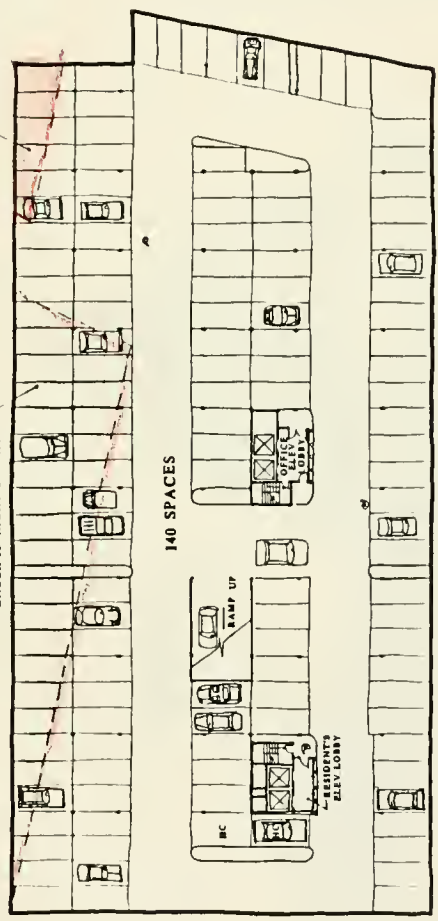
DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES







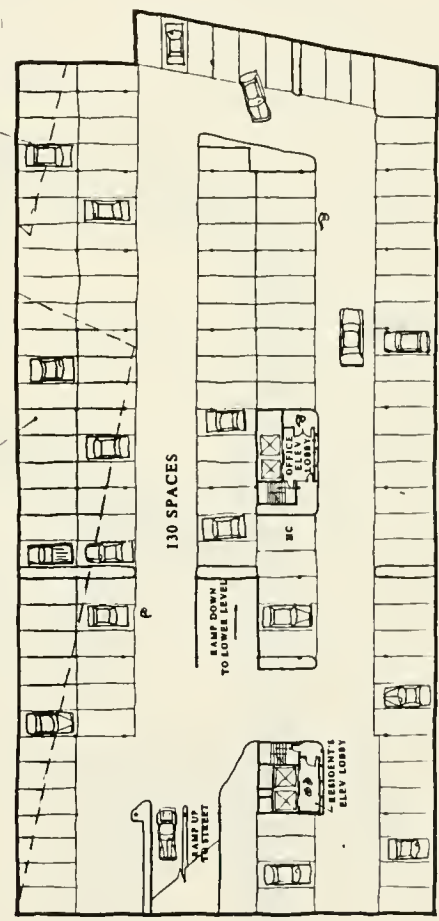
PARKING AREA PROPOSED UNDER 35' RIGHT OF WAY



FLOOR PLAN/SUB-BASEMENT LEVEL



PARKING AREA PROPOSED UNDER 35' RIGHT OF WAY



FLOOR PLAN/BASEMENT LEVEL



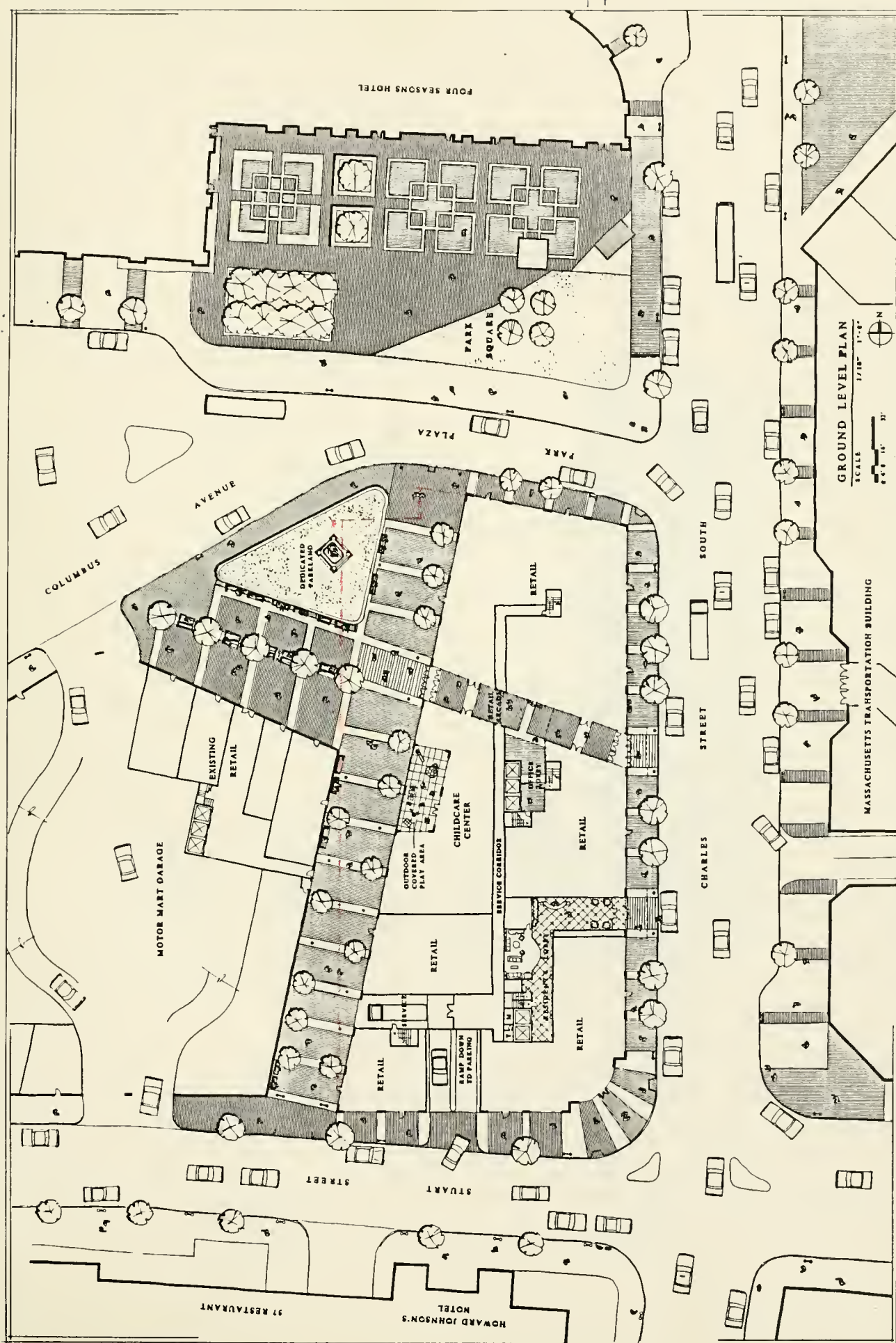
PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH FARE PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES









# PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES

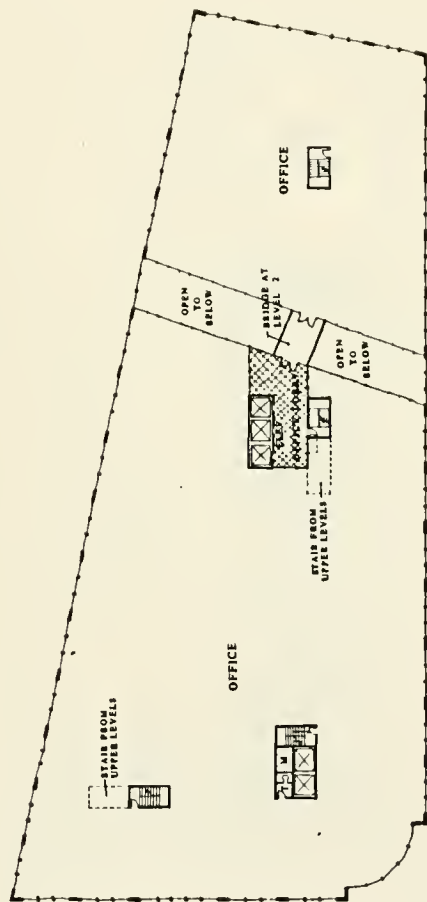
DOWNTOWN PARCEL-PARK SQUARE

BOSTON, MASSACHUSETTS





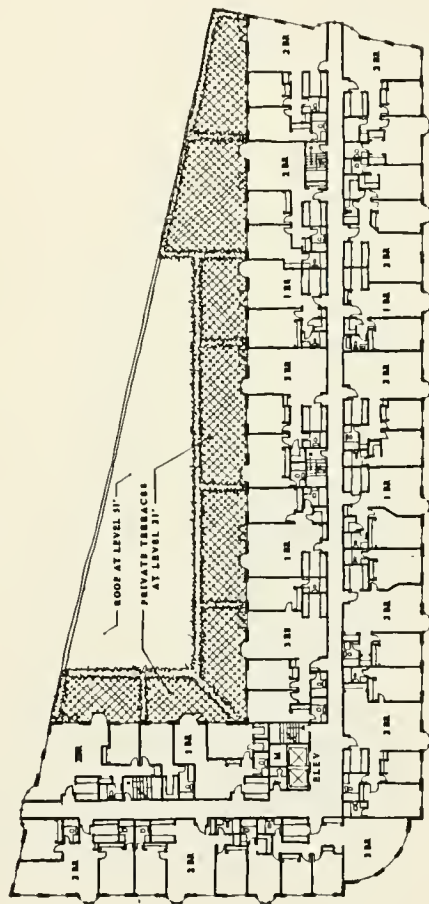




FLOOR PLAN/LEVELS 2,3 & 4  
SCALE 1/32" = 1'-0"



0' 0" 15' 30'



FLOOR PLAN/LEVELS 5,6,7,8 & 9  
SCALE 1/32" = 1'-0"



0' 0" 15' 30'

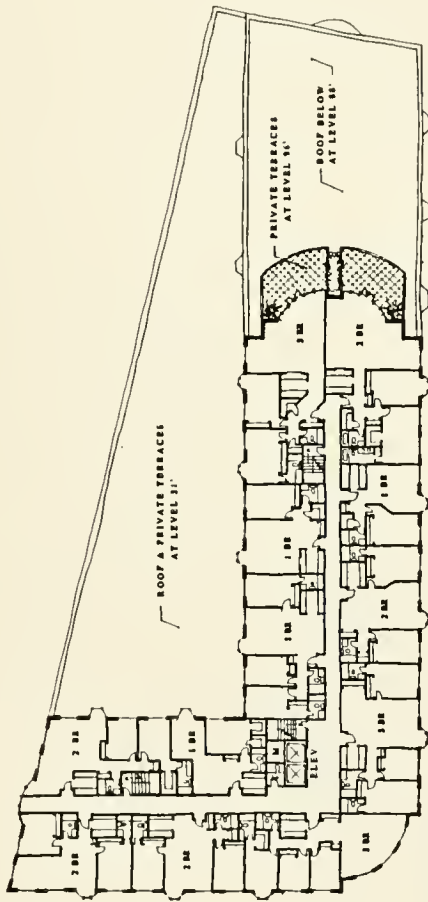
PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECT: MINTZ ASSOCIATES



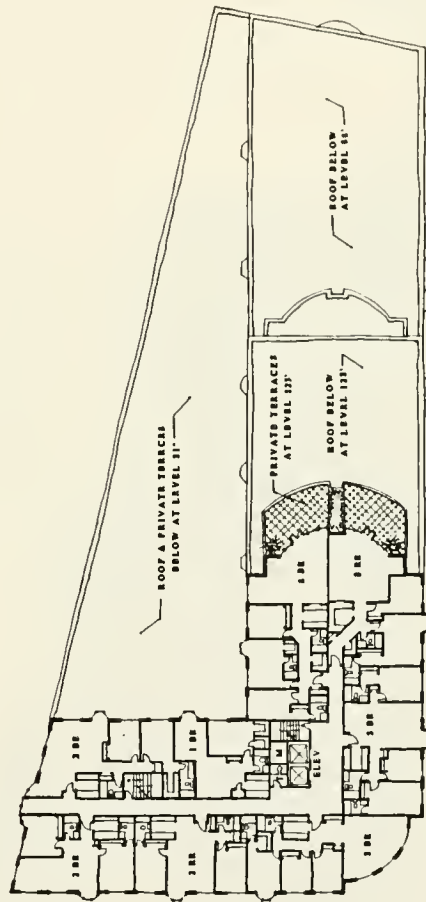






FLOOR PLAN/ LEVELS 10, 11 & 12

SCALE 1/16" = 1'-0"



FLOOR PLAN/ LEVELS 13, 14 & 15

SCALE 1/16" = 1'-0"



PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

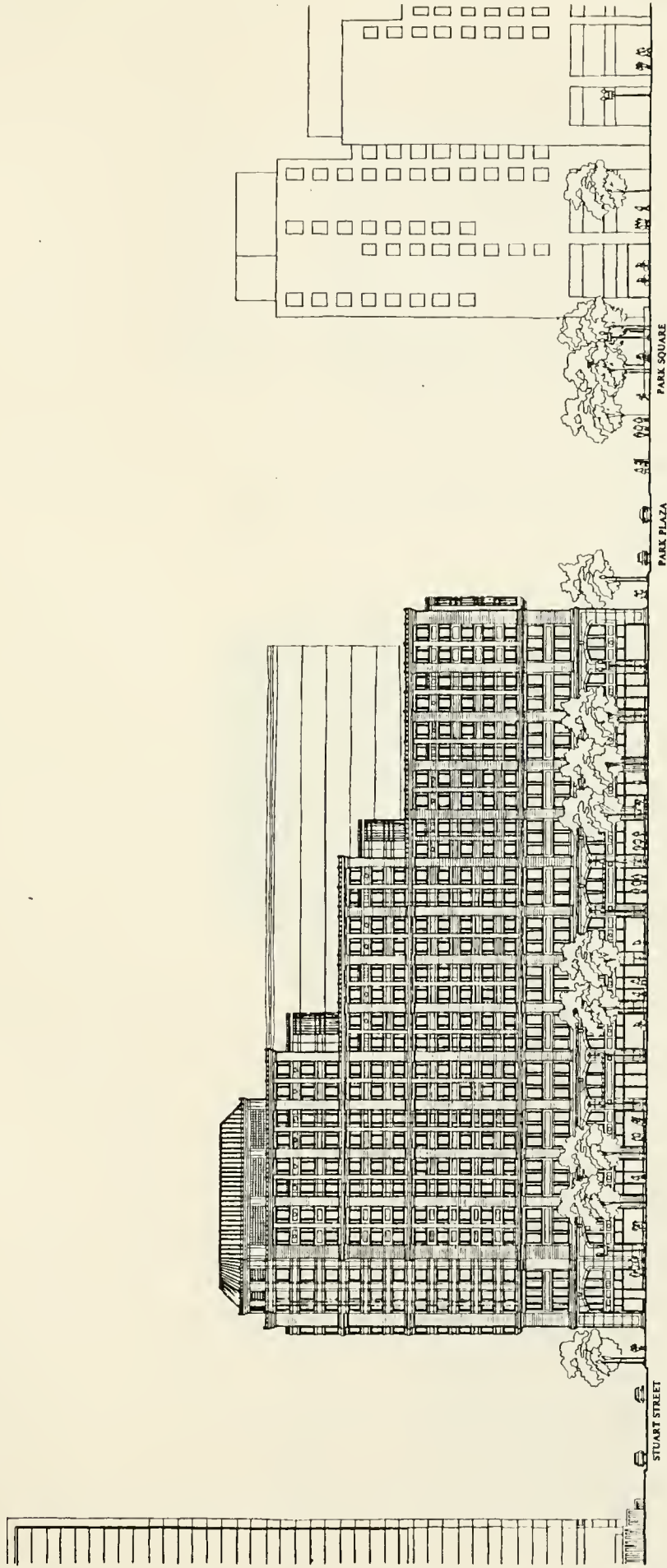
DEVELOPER: THE SOUTH PARK PARTNERSHIP

ARCHITECTS: MINTZ ASSOCIATES









CHARLES STREET ELEVATION  
SCALE 1/16" = 1'-0"

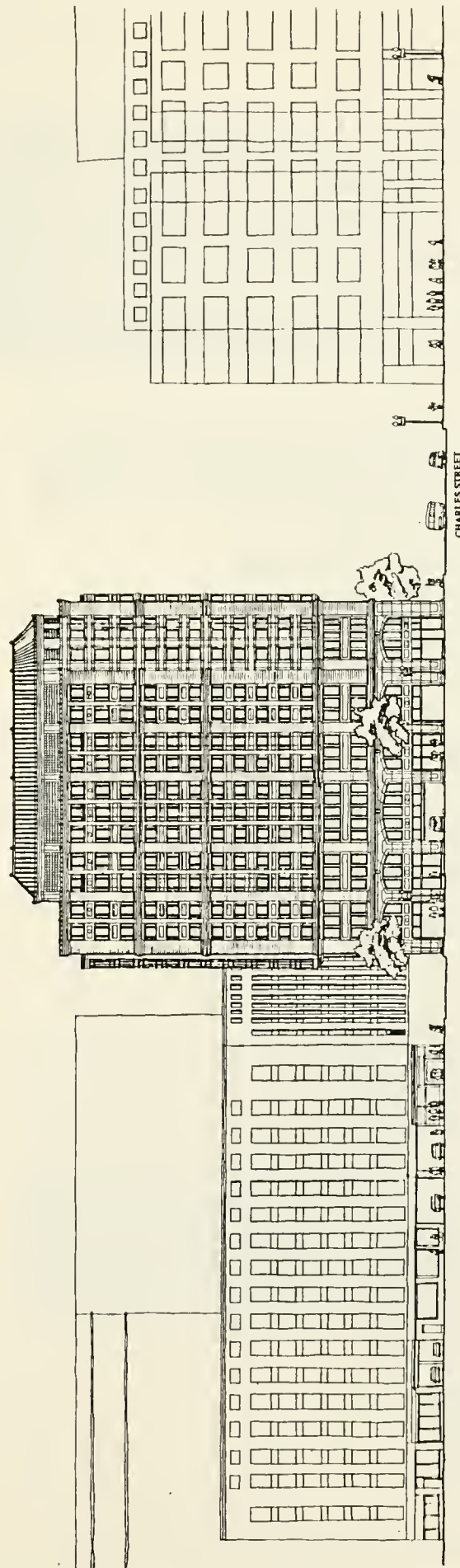
PROPOSED HOUSING /OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES









STUART STREET ELEVATION  
 SCALE: 1/16" = 1'-0"

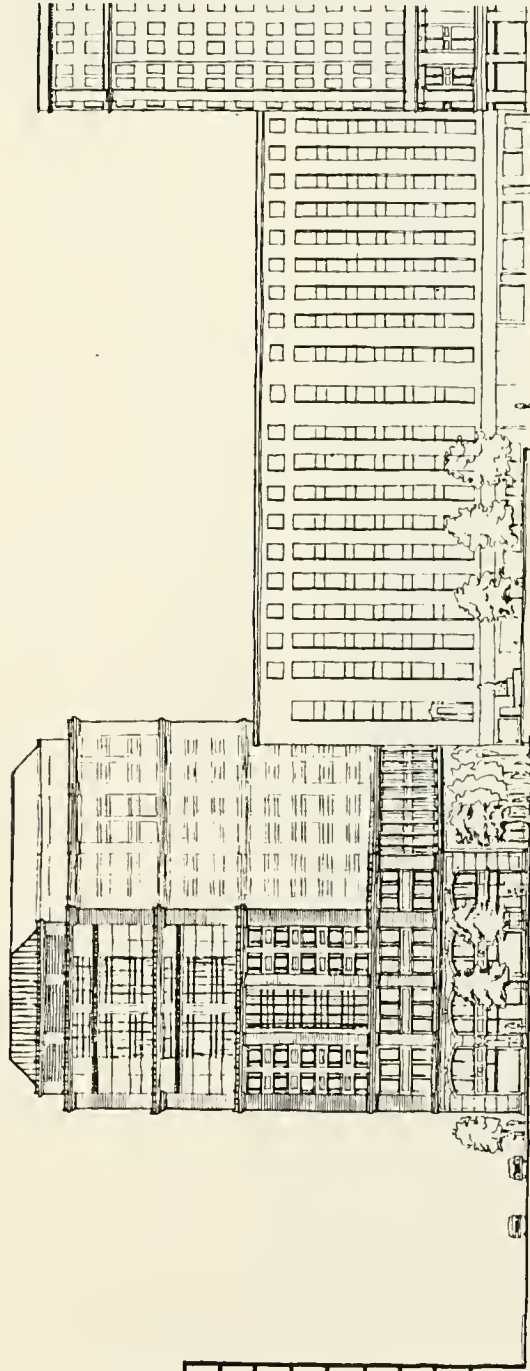
PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
 ARCHITECTS: MINTZ ASSOCIATES



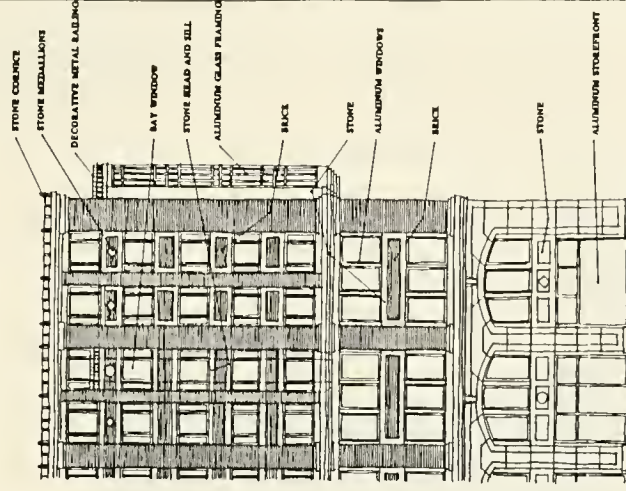






PARK PLAZA ELEVATION

SCALE 1/16" = 1'-0"



ENLARGED ELEVATION  
(SHOWING TYPICAL MATERIALS)

SCALE 1/16" = 1'-0"

PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER THE SOUTH PARK PARTNERSHIP

ARCHITECTS MINTZ ASSOCIATES

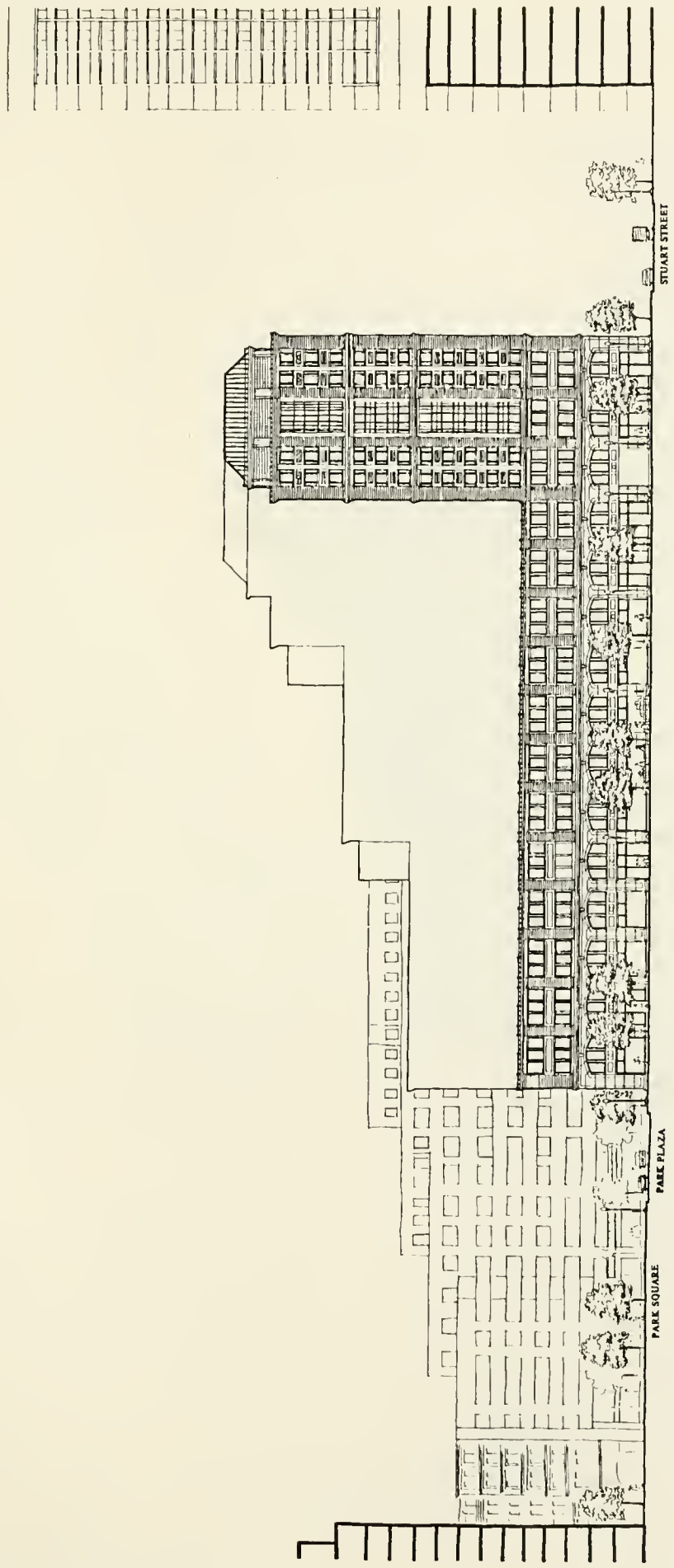
DOWNTOWN PARCEL-PARK SQUARE

BOSTON, MASSACHUSETTS









ELEVATION ALONG PEDESTRIAN/SERVICE RIGHT-OF-WAY

SCALE 1/8" = 1'-0"

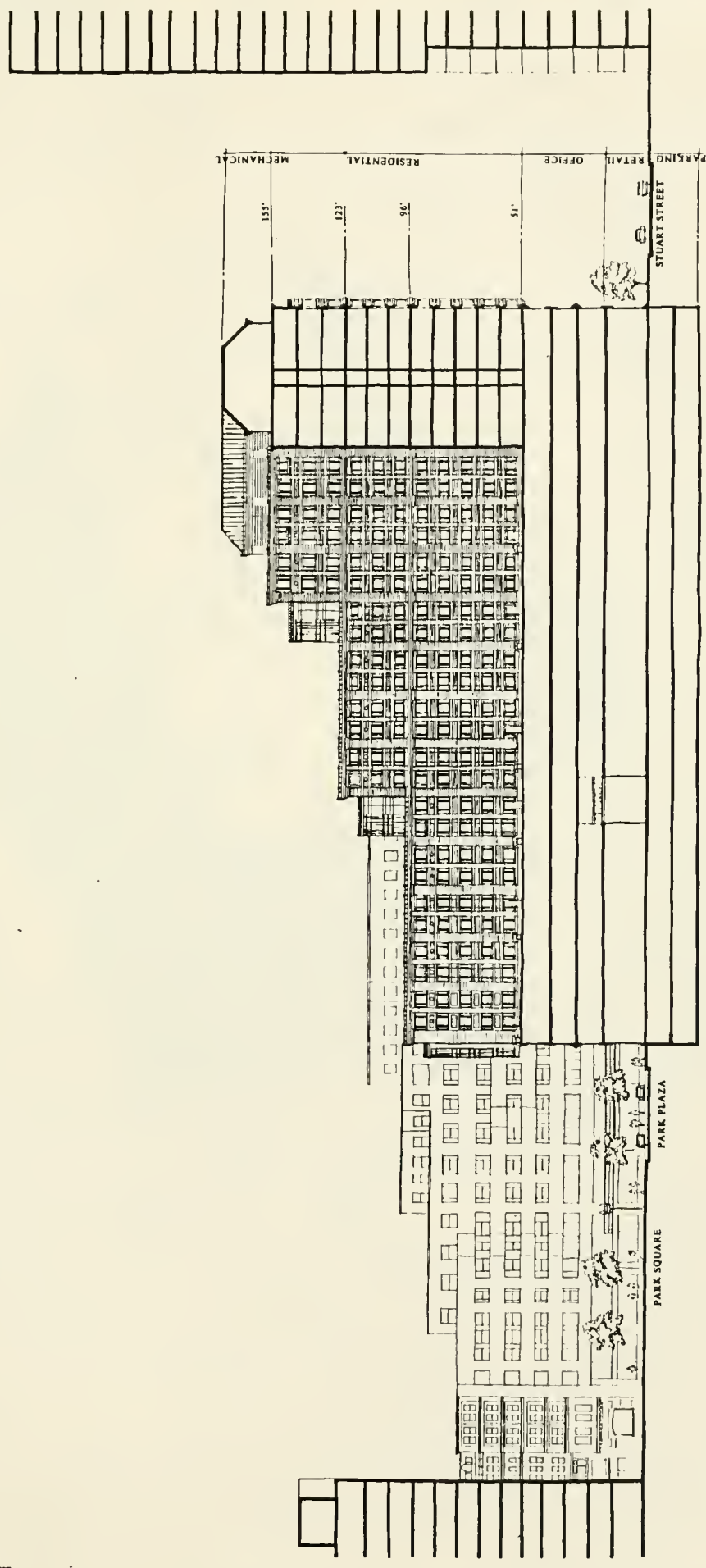
PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES









LONGITUDINAL SECTION (LOOKING EAST)

SCALE 1/16" = 1'-0"

PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES

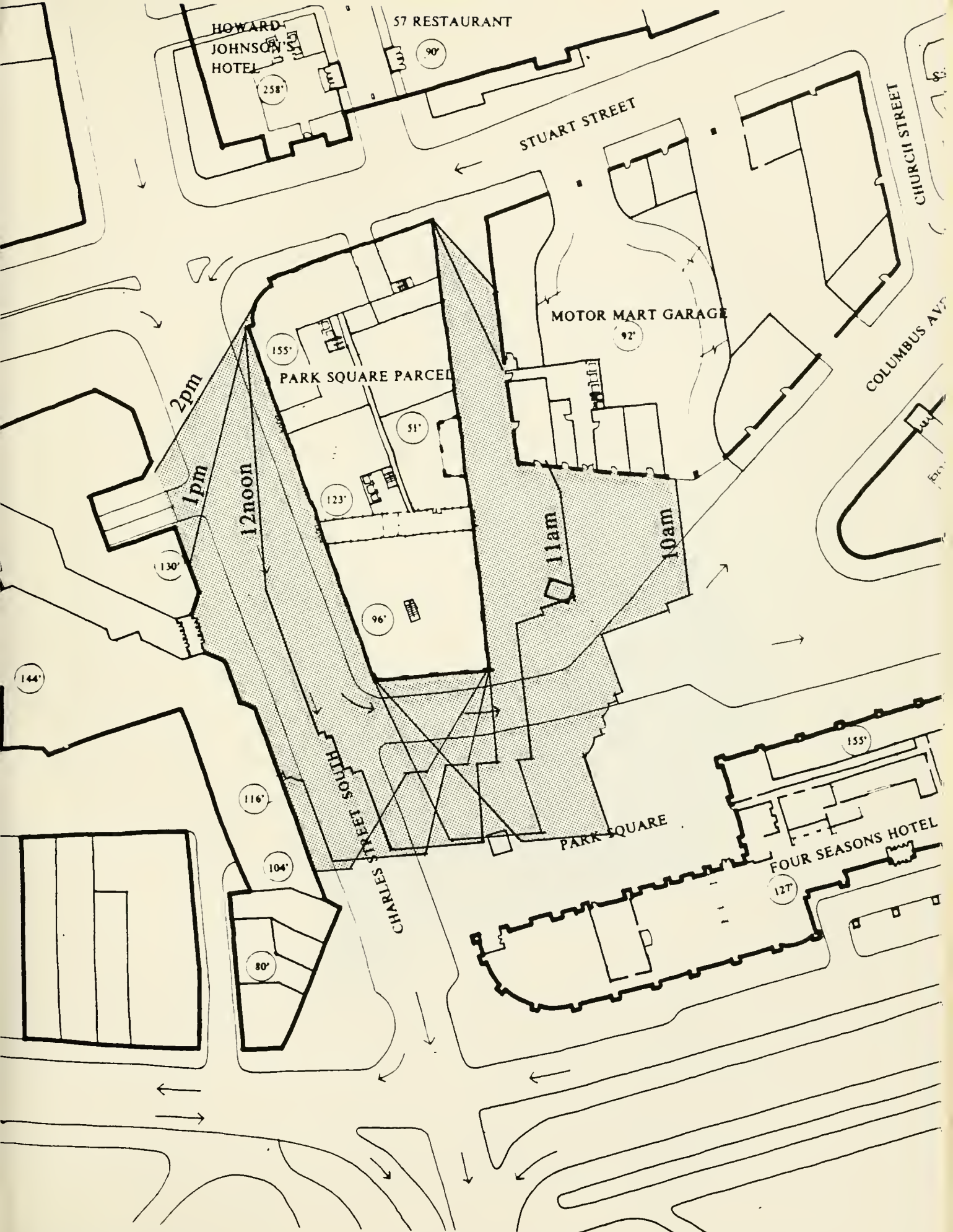
DOWNTOWN PARCEL-PARK SQUARE

BOSTON, MASSACHUSETTS





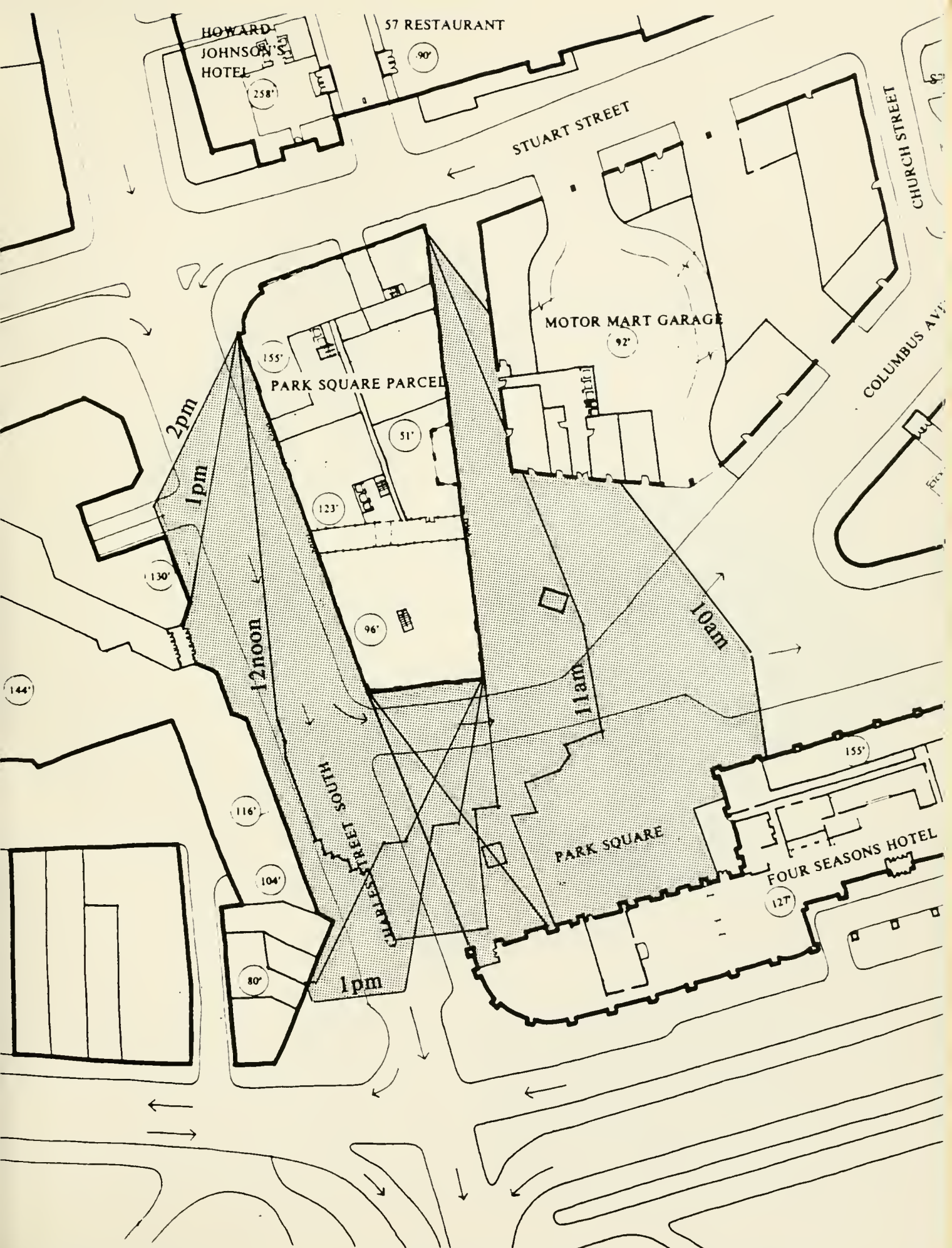








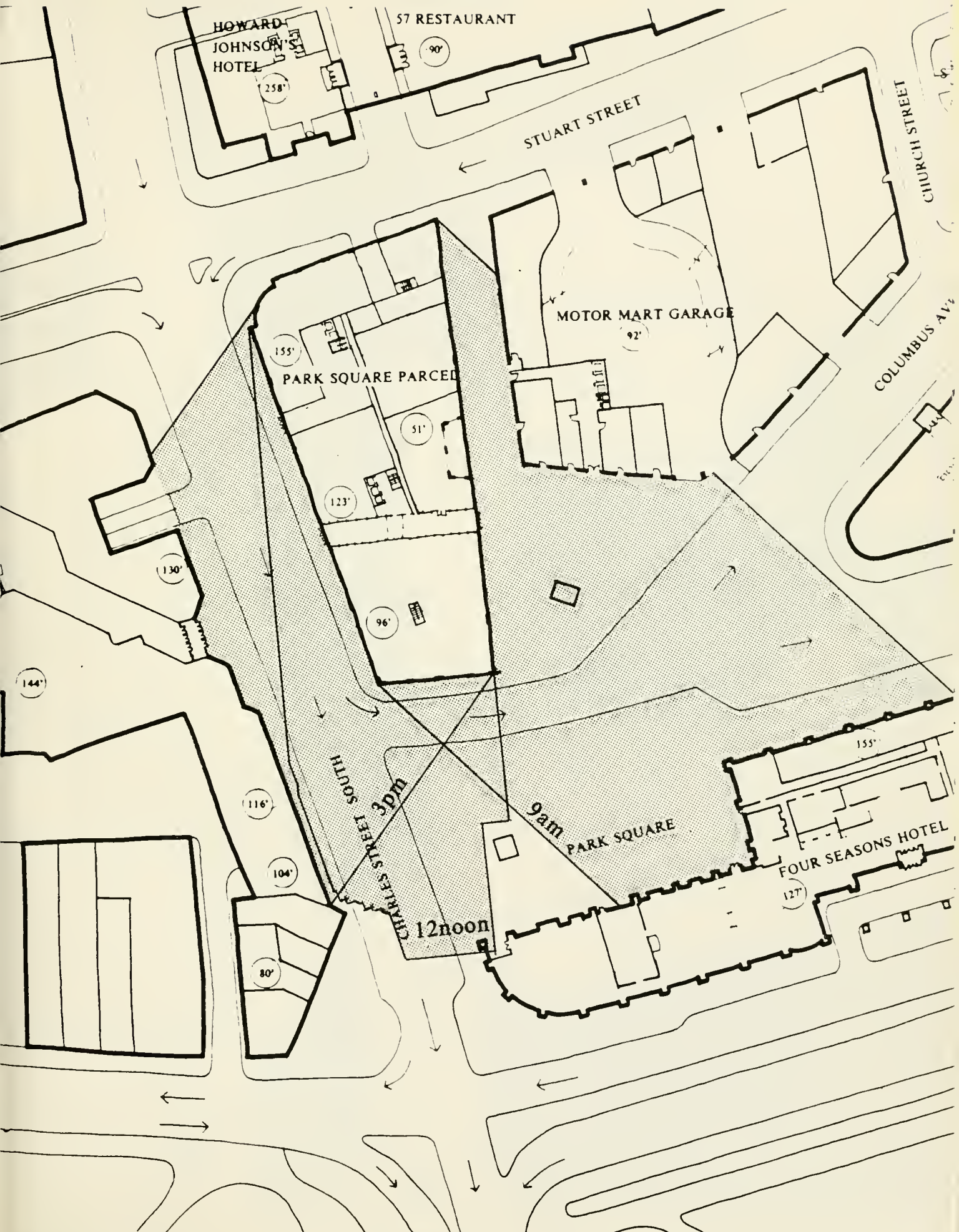








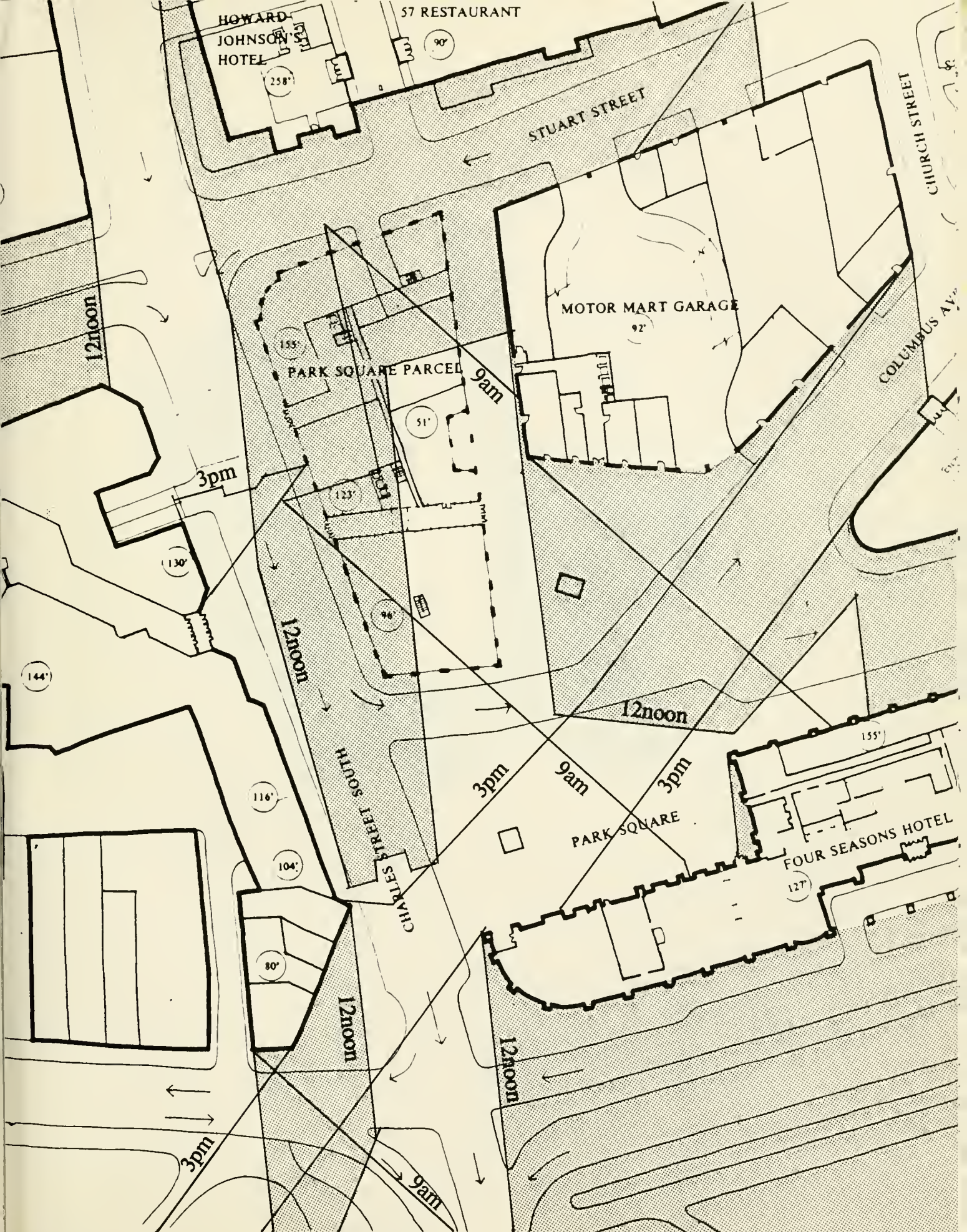








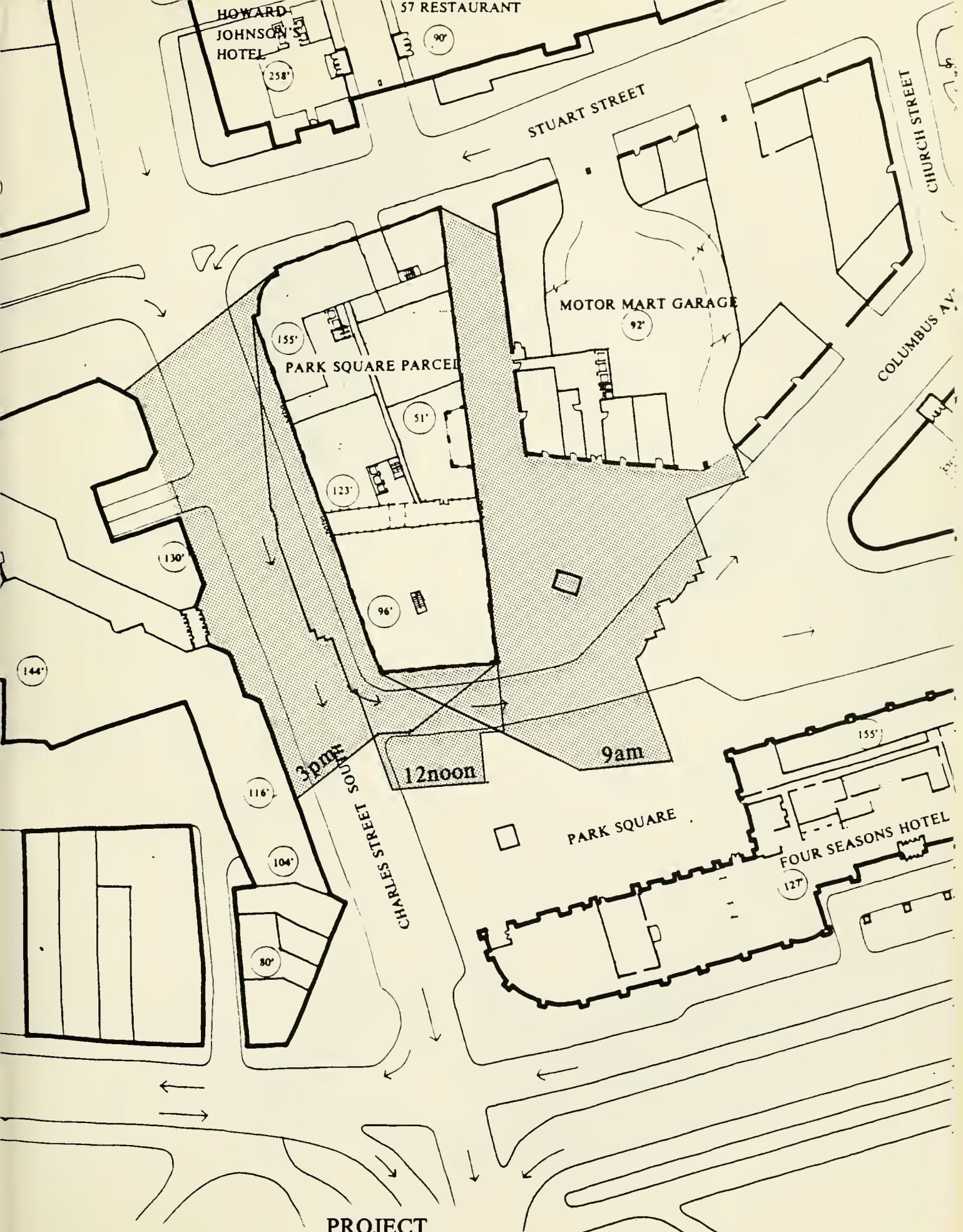












PARK SQUARE

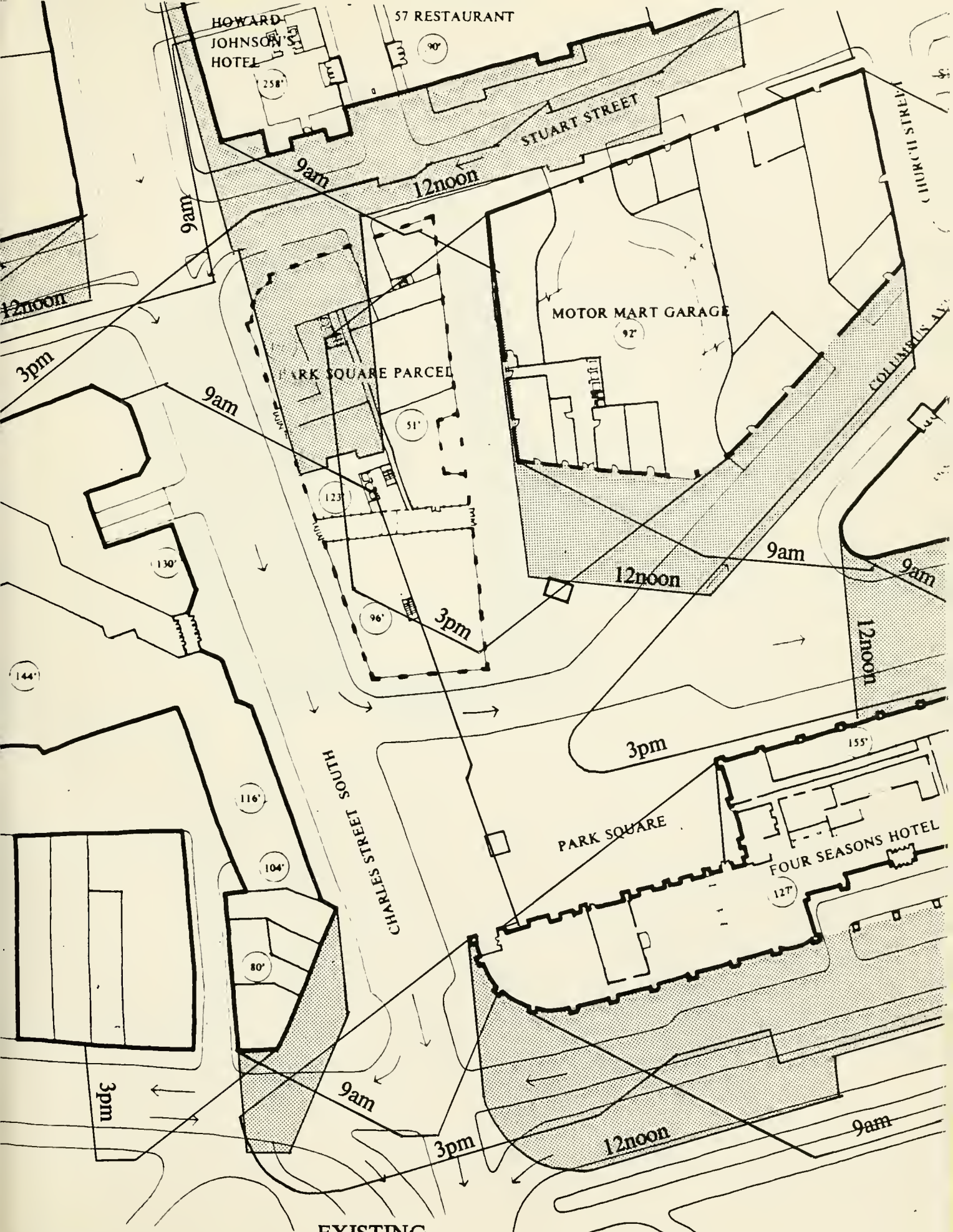
PROJECT  
SHADOWS

MARCH 21 and SEPTEMBER 21









PARK SQUARE

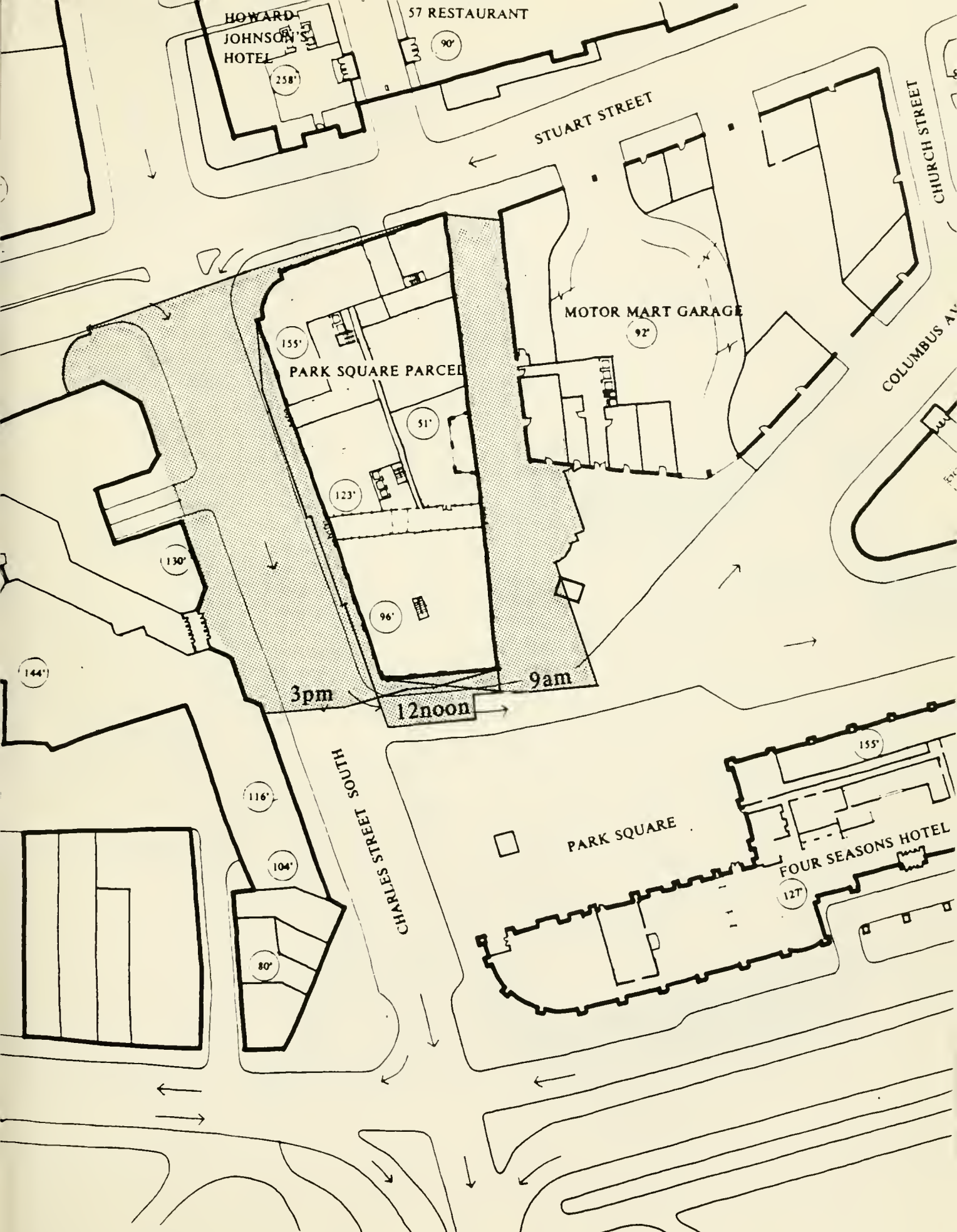
EXISTING  
SHADOWS

MARCH 21 and SEPTEMBER 21









PARK SQUARE

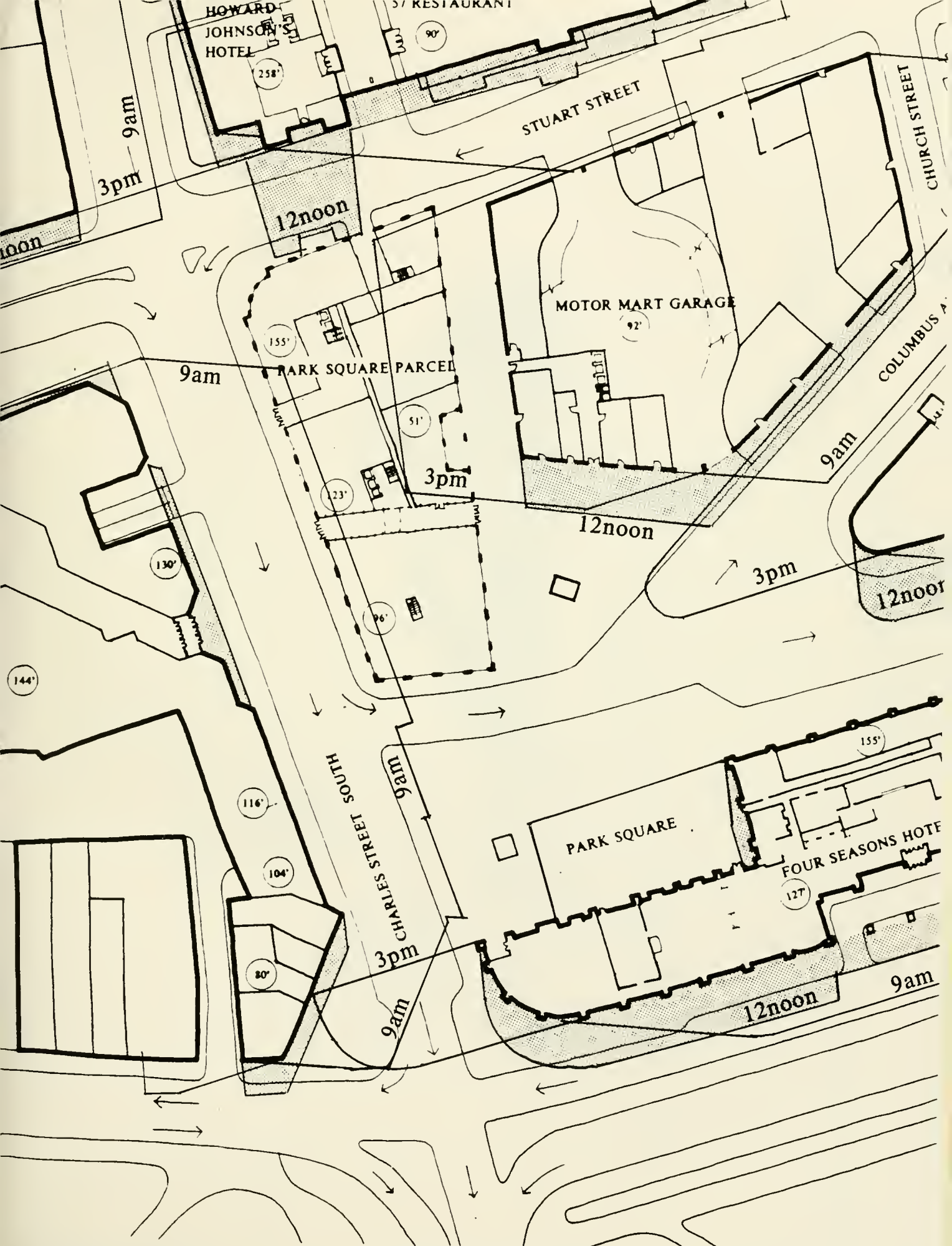
PROJECT SHADOWS

JUNE 21





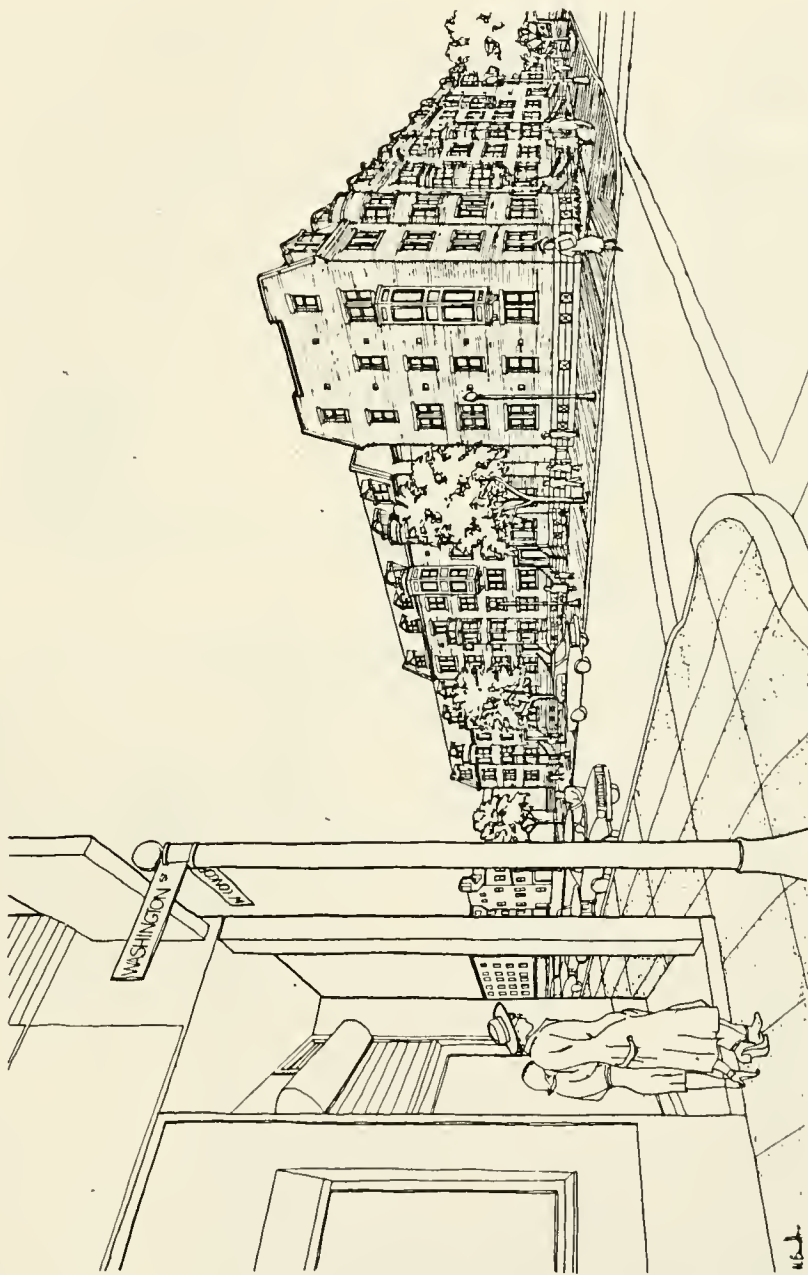












PERSPECTIVE VIEW  
FROM CORNER OF WASHINGTON  
AND WEST CONCORD STREETS

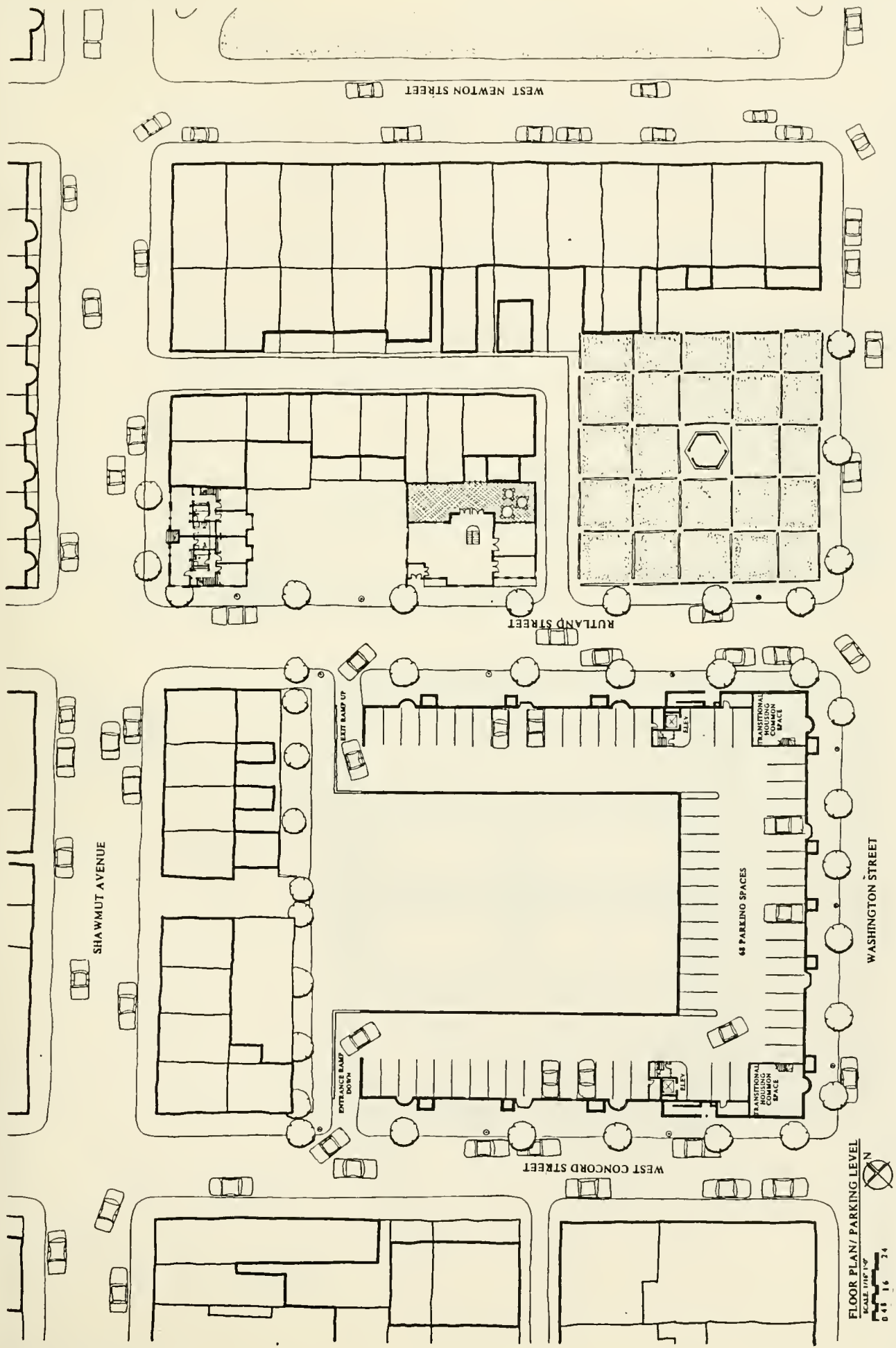
PROPOSED HOUSING/OFFICE/RETAIL DEVELOPMENT AT PARK SQUARE

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES









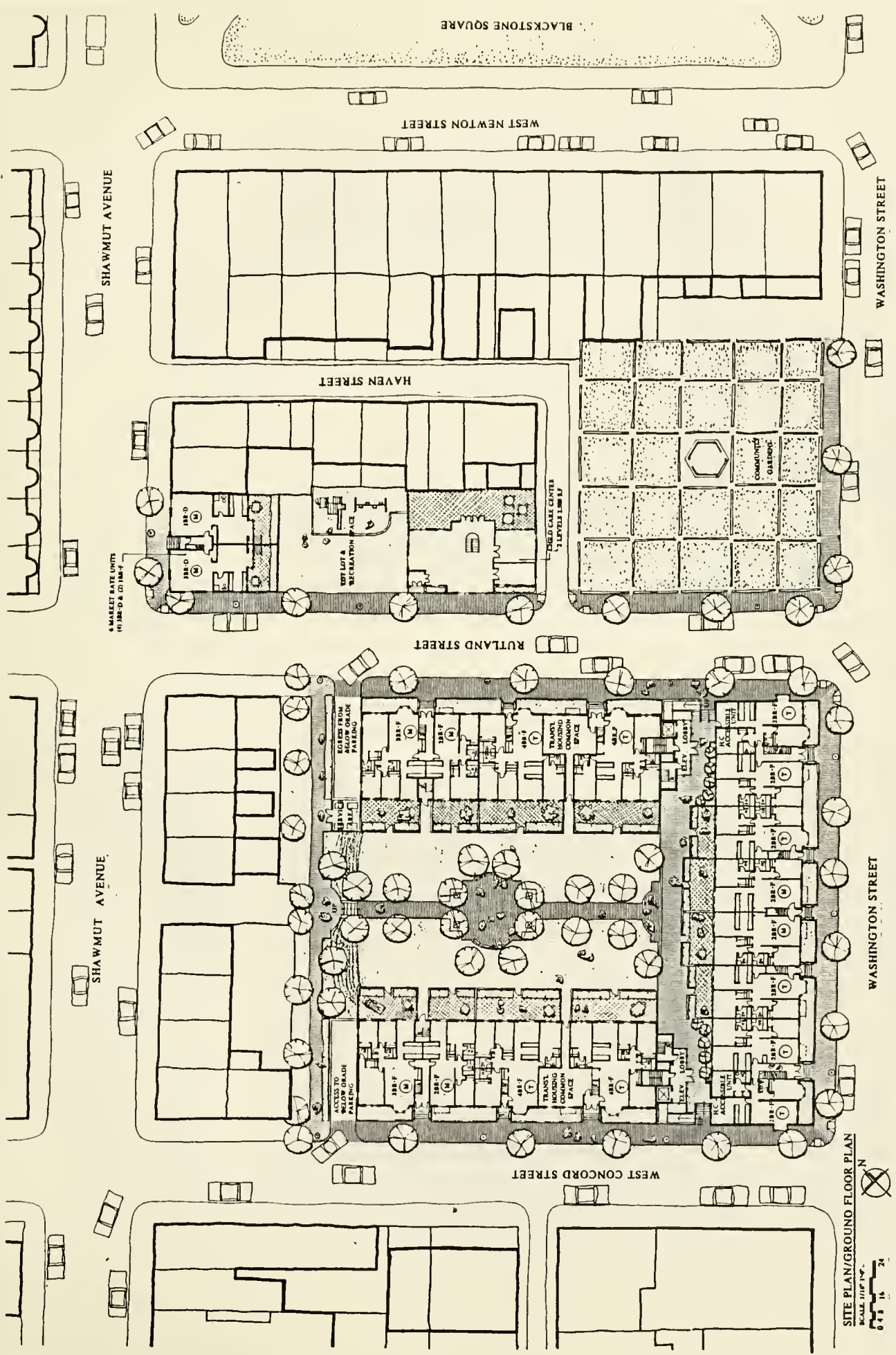
PROPOSED TRANSITIONAL/MODERATE/MARKET RATE HOUSING IN THE SOUTH END

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES









PROPOSED TRANSITIONAL/MODERATE/MARKET RATE HOUSING IN THE SOUTH END

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES





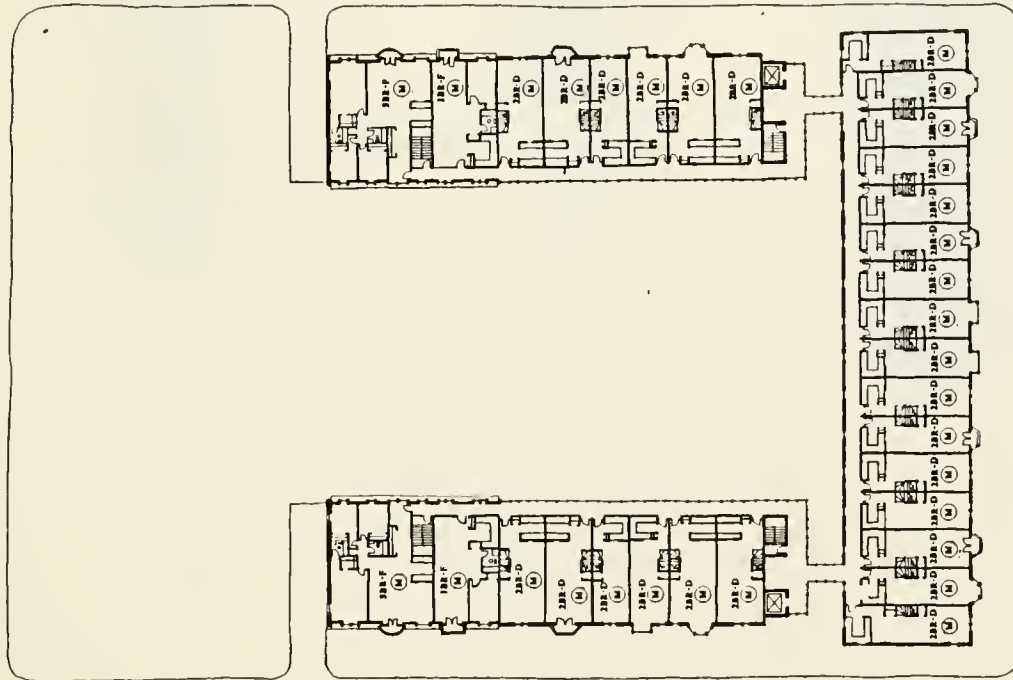






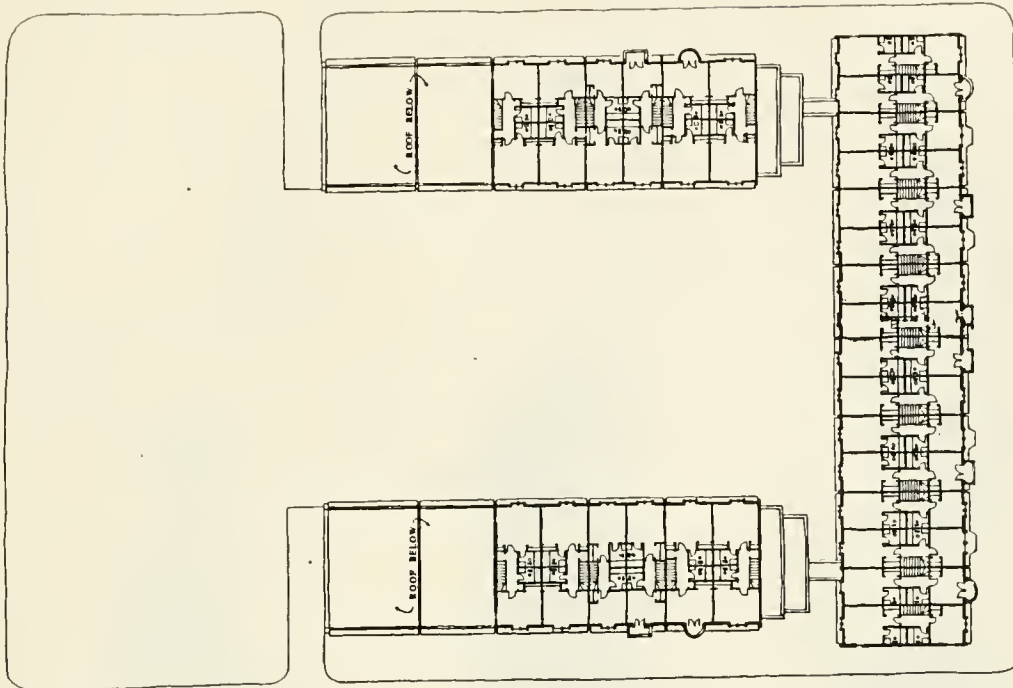






FLOOR PLAN / LEVEL 4

SCALE: 1/8" = 1'-0"



FLOOR PLAN / LEVEL 5

SCALE: 1/8" = 1'-0"



PROPOSED TRANSITIONAL / MODERATE / MARKET RATE HOUSING IN THE SOUTH END

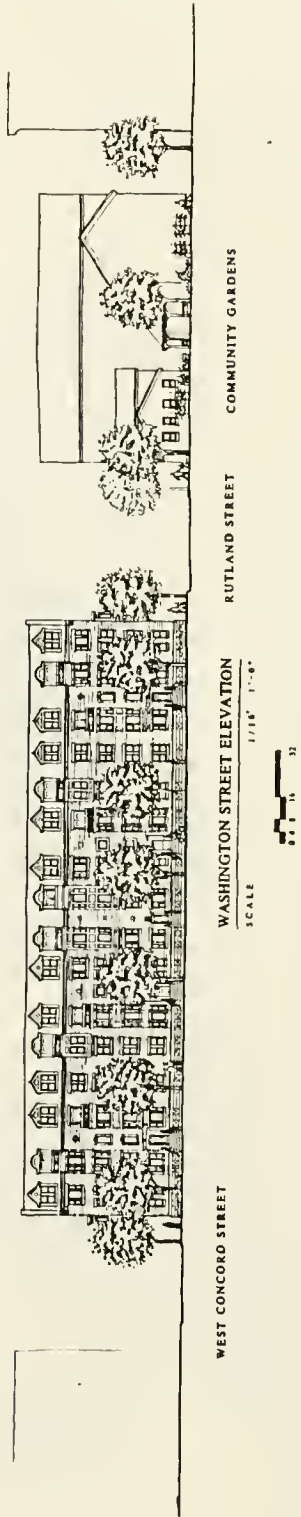
DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ-ASSOCIATES

NEIGHBORHOOD PARCELS - SOUTH END









PROPOSED TRANSITIONAL/MODERATE/MARKET RATE HOUSING IN THE SOUTH END

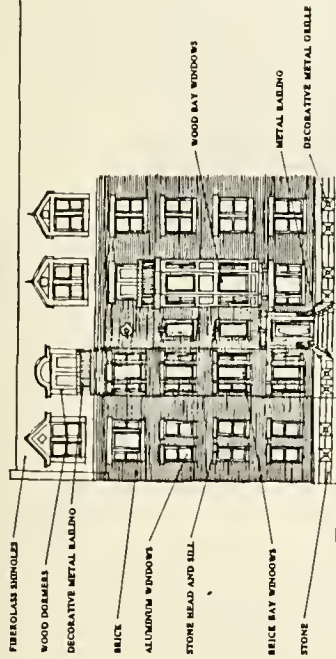
DEVELOPER THE SOUTH PARK PARTNERSHIP  
ARCHITECTS MINTZ ASSOCIATES

NEIGHBORHOOD PARCELS-SOUTH END



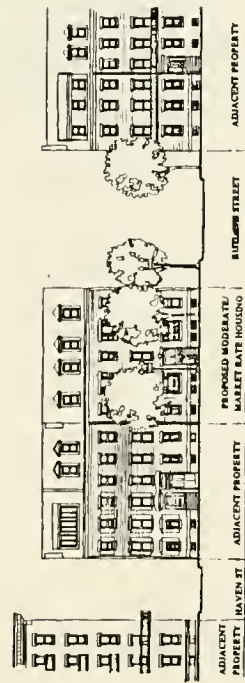






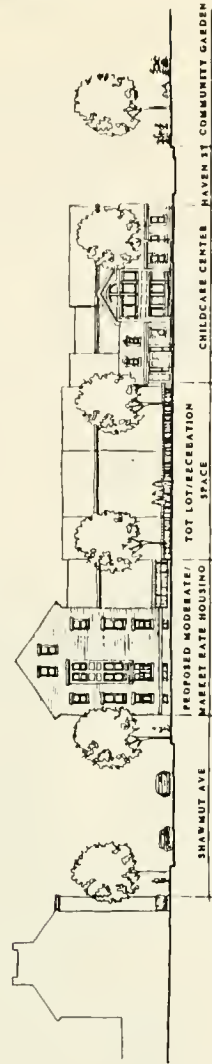
SCALE 1/16" = 1'-0"  
0 4 8 12 24

ENLARGED ELEVATION (SHOWING TYPICAL MATERIALS)



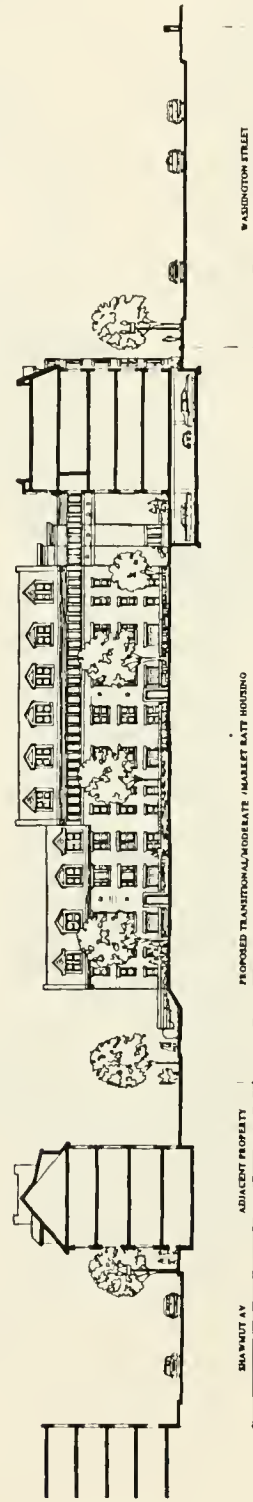
SHAWMUT AVENUE ELEVATION

SCALE 1/16" = 1'-0"  
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RUTLAND STREET ELEVATION

SCALE 1/16" = 1'-0"  
0 4 8 16 24



LONGITUDINAL SECTION

SCALE 1/16" = 1'-0"  
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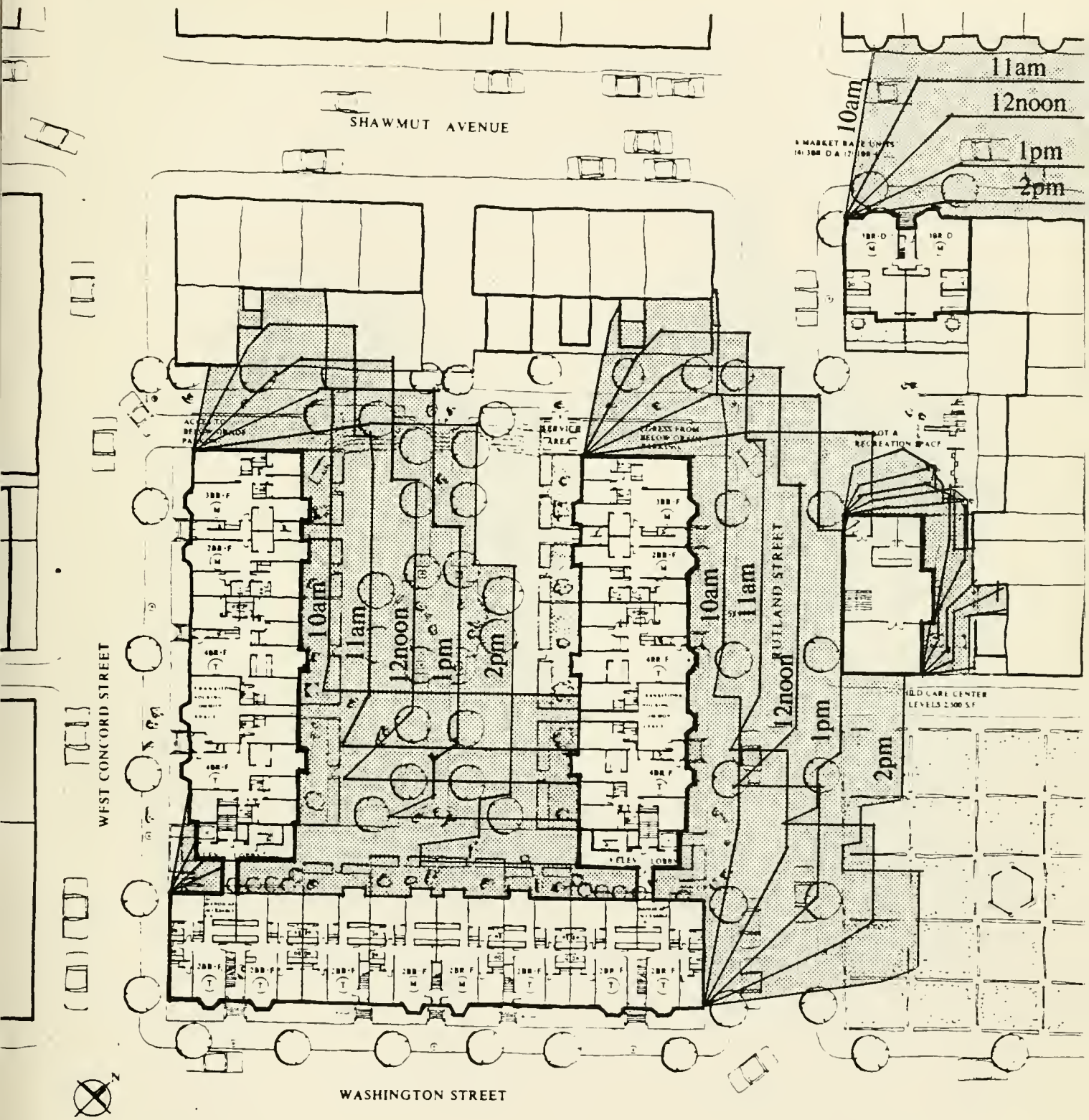
PROPOSED TRANSITIONAL/MODERATE/MARKET RATE HOUSING IN THE SOUTH END

DEVELOPER: THE SOUTH PARK PARTNERSHIP  
ARCHITECTS: MINTZ ASSOCIATES





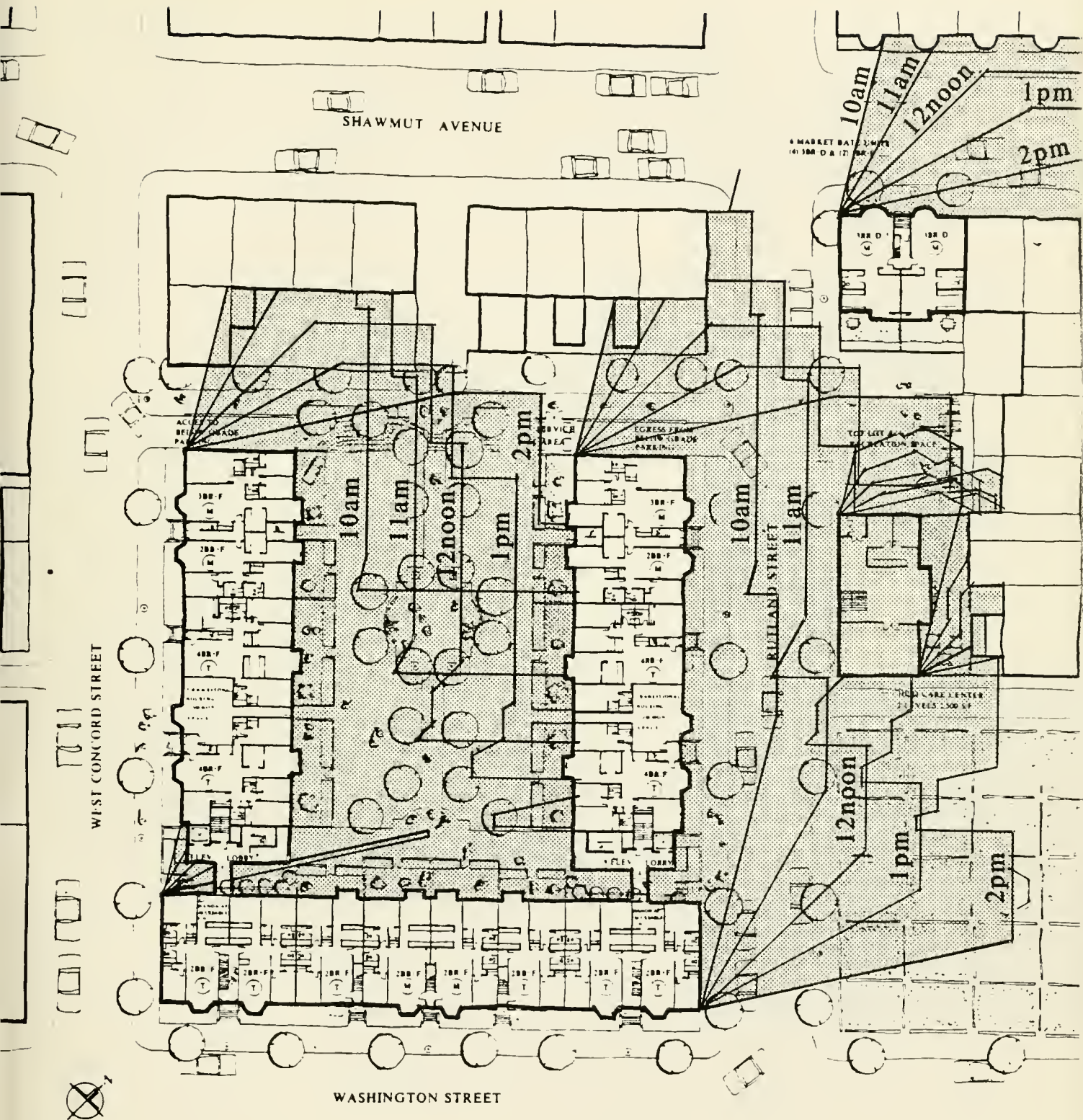












SOUTH END

PROJECT SHADOWS

NOVEMBER 21





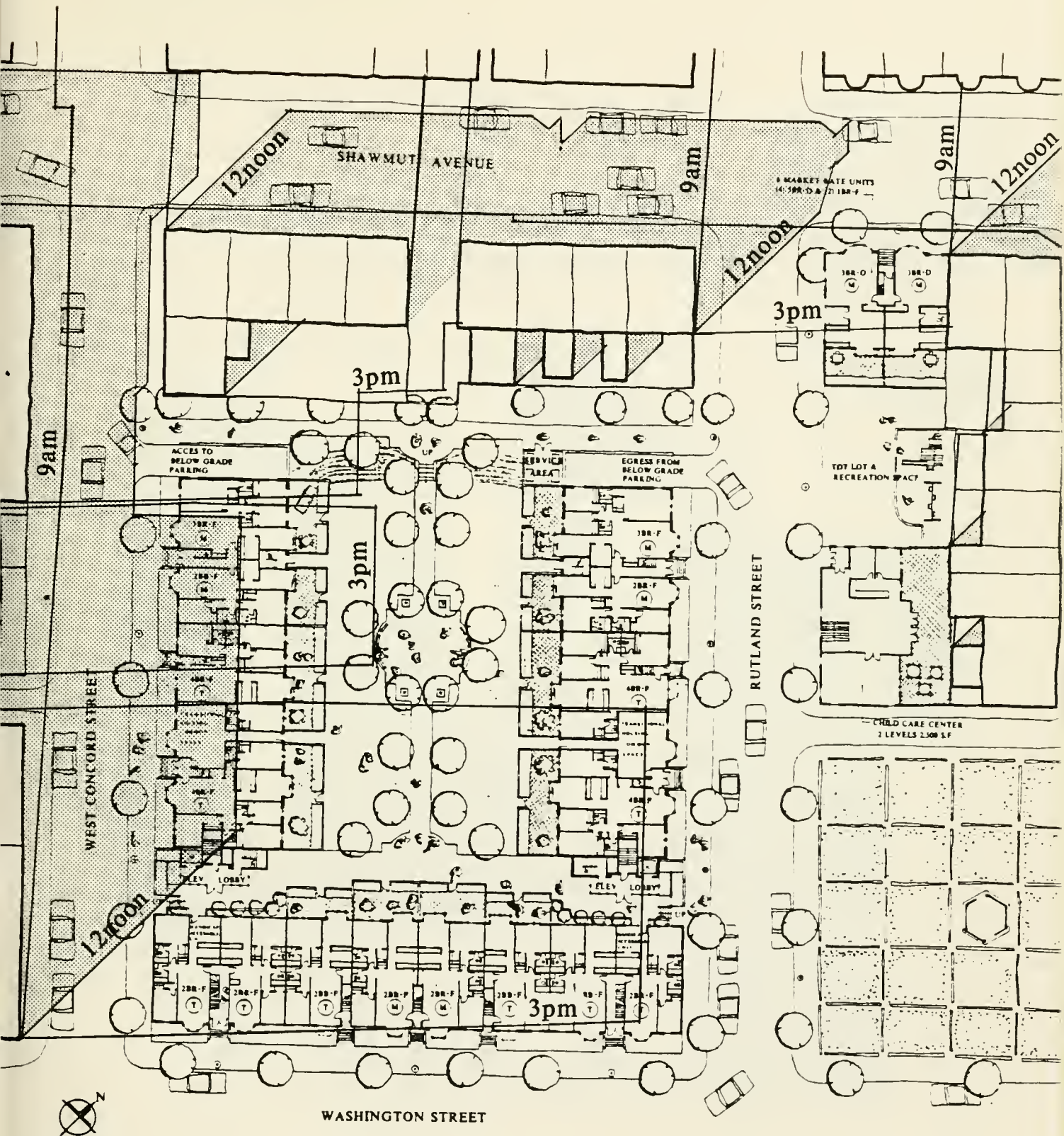












SOUTH END

EXISTING SHADOWS

DECEMBER 21





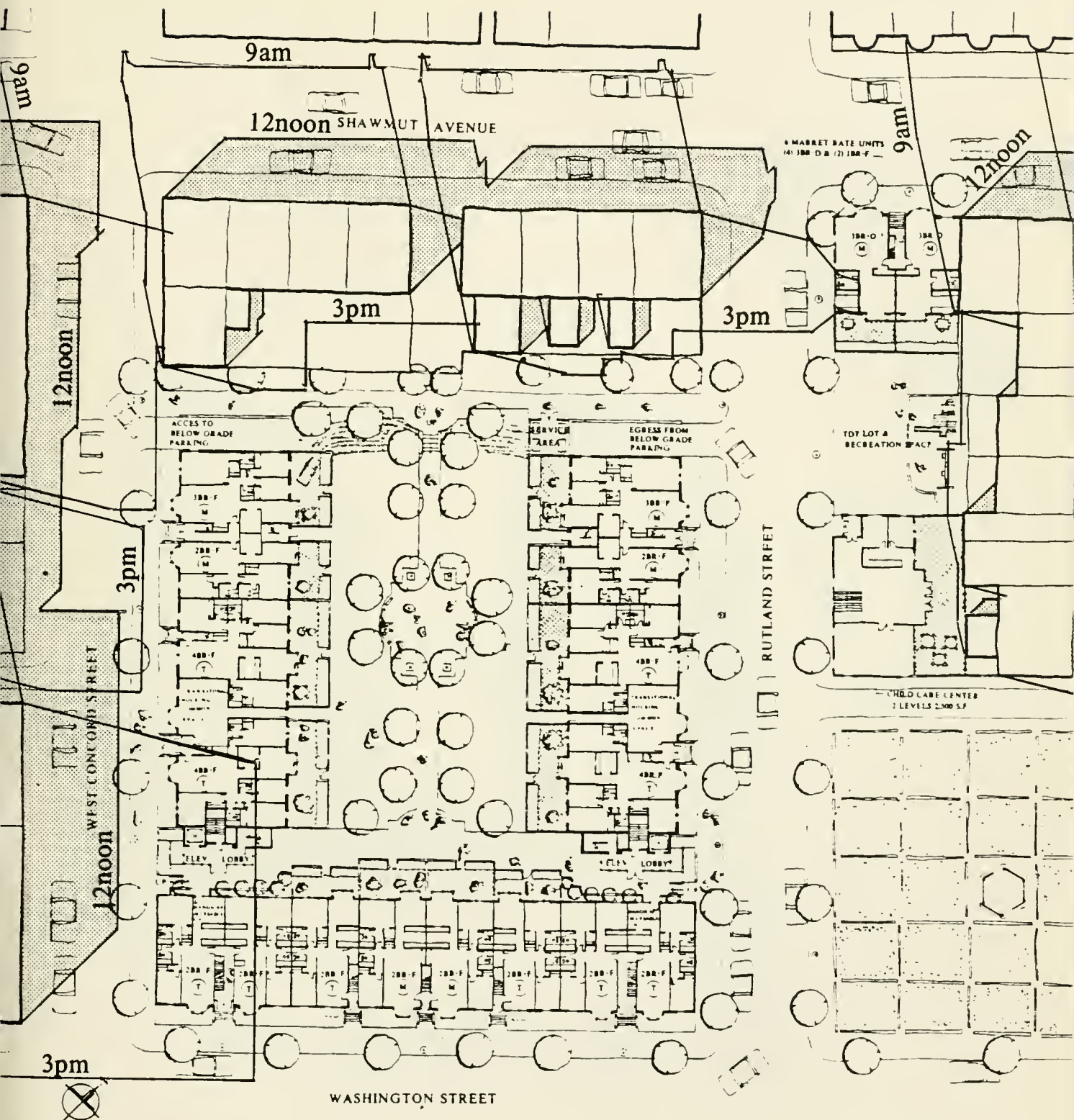










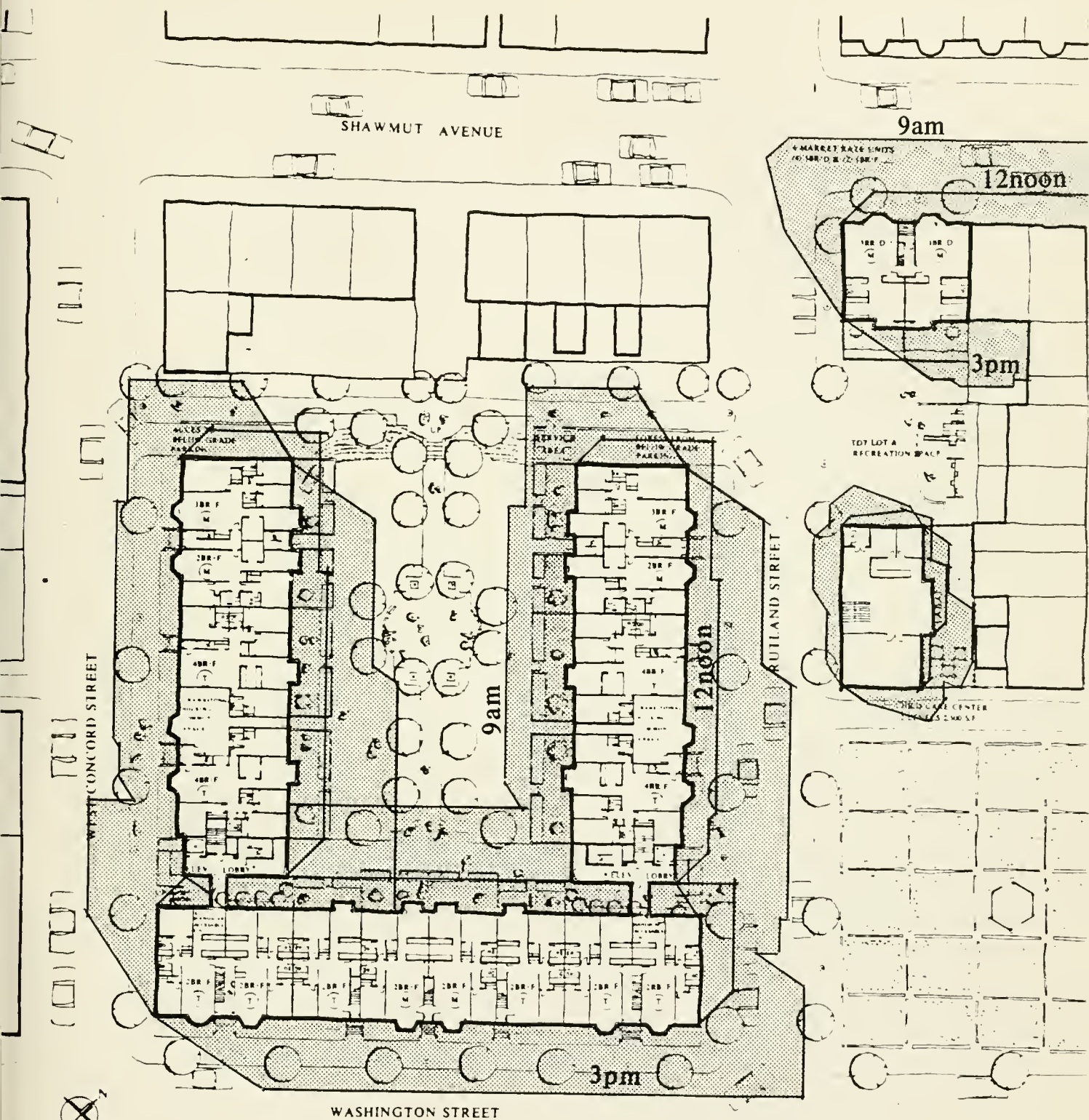


SOUTH END EXISTING SHADOWS MARCH 21 and SEPTEMBER 21









SOUTH END

PROJECT SHADOWS

JUNE 21















## 7.00 FINANCIAL PROPOSAL/PROJECT SCHEDULE

### 7.10 Development Budget - Park Square

The Development Budget for the Park Square site is summarized below.

DEVELOPMENT BUDGET - PARK SQUARE			
Description	Total Cost	Cost Per SF of Bldg	Cost Guides
Pre-Development	559,884	1.45	1.50% Const Cost
Land			
City of Boston	50,800	0.13	1.00 Per SF /Yr
Private Ownership	4,960,000	12.84	50.00 Per FAR Ft
Subtotal	5,010,800	12.97	
Construction			
Office	8,550,000	22.14	95.00 Per SF
Retail	1,760,000	4.56	80.00 Per SF
Day Care	330,000	0.85	110.00 Per SF
Tenant Improve & Incent	2,250,000	5.83	25.00 Per SF
Residential	19,272,000	49.89	110.00 Per SF
Parking	5,163,600	13.37	60.00 Per SF
Mechanical and Service	600,000	1.55	60.00 Per SF
Subtotal	37,325,600	96.63	
Artwork and Amenities	373,256	0.97	1.00% Const Cost
Professional Fees			
Architect	1,679,652	4.35	4.50% Const Cost
Others	559,884	1.45	1.50% Const Cost
Subtotal	2,239,536	5.80	
Developer Expenses	933,140	2.42	2.50% Const Cost
Legal and Accounting	466,570	1.21	1.25% Const Cost
Bonds, Insurance, and Permits	559,884	1.45	1.50% Const Cost
Marketing and Leasing			
Marketing	373,256	0.97	1.00% Const Cost
Sales Commissions	2,921,240	7.56	5.00% Gross Sales
Leasing	936,075	2.42	18.00% Gross Rent
Subtotal	4,230,571	10.95	24.00% Const Cost
Financial			
Financing Fees	1,381,209	3.58	2.00% Devel Cost
Closing Costs	345,302	0.89	0.50% Devel Cost
Real Estate Taxes	373,256	0.97	1.00% Const Cost
Subtotal	2,099,767	6.99	
Working Capital	186,628	0.48	0.50% Const Cost
Contingency	3,732,560	9.66	10.00% Const Cost
Net Development Budget	57,718,196	150.99	
Interim Interest	11,342,230	29.36	16.42% Devel Cost
Operating Losses thru B/E	0	0.00	0.00% Const Cost
Total Development Budget	69,060,426	180.35	







Pre-Development costs are costs incurred by the development team prior to a formal go/no go decision on the project.

Land costs are divided between land owned by the City of Boston and land in private ownership. We have assumed that city land will be leased to the development for a base rent of \$1.00 per square foot of land per year to minimize costs in the initial years of the project and to improve the financial feasibility of providing affordable housing units, transitional housing units, and day care and other social services as part of this linkage proposal (see Stabilized Operating Pro Forma section below for additional rent for the land lease). The lease term should be 99 years and the lease should be subordinated to project financing. The cost for acquiring privately-held land is assumed at \$50.00 per buildable square foot. This cost reflects current land values downtown and in Back Bay and anticipated negotiations with the landowner.

Construction costs have been confirmed with local contractors, other developers, and architects. Artwork and Amenities includes an allowance for art, public area seating, and other amenities that may be provided in common spaces.

Professional fees include the cost of consulting services. Costs of architectural as well as structural and mechanical engineering work will be paid on a partially deferred basis in return for an equity position in the development for the architect. This helps to reduce up-front costs.

Developer expenses reimburse the development team for out-of-pocket expenses as well as provide an incentive for the team. Legal and accounting costs are carried as an allowance. Bonds, insurance, and permits include all costs necessary to bond and insure the project, as well as all permit fees paid directly by the developer to the City of Boston.

Marketing and leasing costs include all costs and commissions necessary in the sale and leasing of project components. Financial costs include fees to lenders, costs for closing the project financing, as well as an allowance for real estate taxes to be paid to the city during the construction period. Working capital funds are carried as an allowance to provide initial funds to purchase materials and equipment necessary for the maintenance and operation of the property.

A construction contingency of ten per cent is included in the project. No contingency has been included for soft costs.

Interim interest has been assumed to include all interest costs through project stabilization and sell-out. Therefore Operating Losses through Break-Even do not appear on the statement.







## 7.20 Development Budget - South End

The Development Budget for the South End sites is summarized below.

DEVELOPMENT BUDGET - SOUTH END			
Description	Total Cost	Cost Per SF of Bldg	Cost Guides
Pre-Development	242,250	1.81	2.50% Const Cost
Land			
Transitional	0	0.00	
Moderate-income	0	0.00	0.00% Sales Price
Market-rate	300,000	2.25	10.000 /#wt Unit
Support Services	0	0.00	
Subtotal	300,000	2.25	
Construction			
Residential	8,100,000	60.67	80.00 Per SF
Support Services	540,000	4.04	90.00 Per SF
Parking	1,050,000	7.87	40.00 Per SF
Subtotal	9,690,000	72.58	
Artwork and Amenities	96,900	0.73	1.00% Const Cost
Professional Fees			
Architect	436,050	3.27	4.50% Const Cost
Others	145,350	1.09	1.50% Const Cost
Subtotal	581,400	4.36	
Developer Expenses	242,250	1.81	2.50% Const Cost
Legal and Accounting	121,125	0.91	1.25% Const Cost
Bonds, Insurance, and Permits	121,125	0.91	1.25% Const Cost
Marketing and Leasing			
Marketing	121,125	0.91	1.25% Const Cost
Sales Commissions	369,765	2.77	5.00% Gross Sales
Leasing	0	0.00	0.00% Const Cost
Subtotal	490,890	3.68	6.25% Const Cost
Financial			
Financing Fees	96,900	0.73	1.00% Const Cost
Closing Costs	48,450	0.36	0.50% Const Cost
Real Estate Taxes	96,900	0.73	1.00% Const Cost
Subtotal	242,250	1.81	
Working Capital	48,450	0.36	0.50% Const Cost
Contingency	969,000	7.26	10.00% Const Cost
Net Development Budget	13,145,640	96.65	
Interim Interest	1,625,049	12.17	11.00% Devel Cost
Total Development Budget	14,770,689	108.83	







### 7.30 Project Schedule

The South Park Partnership will begin construction on both the Park Square and South End components on the same date. We project that construction can be completed within an 18-24 month period. Assuming that all negotiations can be successfully completed within 15-18 months, construction could begin in early Spring 1989. This also assumes that an acceptable commitment or commitments for project financing has (have) been received and all required government approvals and permits have been issued. Initial occupancy of residential and commercial components may be as early as Fall, 1990 with complete sell-out and lease-up projected in 1992.

### 7.40 Sources and Uses of Funds

The following tables summarize the sources and uses of funds for the development, as well as operating pro formas through the year 2000 assuming constant costs of financing and constant rates of income, expense, and tax escalation. The tables integrate the surplus funds from the Park Square project with the deficits incurred by the South End project. Funds invested by the development team and anticipated profits are indicated.







Assumed Annual Rent Increase	4.00%
Assumed Annual Exp Increase	4.00%
Assumed Annual Tax Increase	3.00%

## SOURCES OF FUNDS

SCALE 30 5350

## REVIEWS

[illegible]







Less: Vacancies (5s)	0	(260,021)	(262,268)	(264,599)	(267,017)	(290,667)	(315,257)	(317,958)	(320,760)	(323,667)
Add: Expense Reimbursement	0	17,500	36,252	37,550	38,895	40,290	41,736	43,234	44,787	46,397
Net Income	2,725,283	4,957,897	5,019,339	5,064,925	5,112,218	5,562,963	6,031,625	6,084,436	6,139,228	6,196,076
Less: Operating Expenses										
Office	(253,094)	(526,436)	(547,494)	(559,394)	(592,169)	(615,856)	(640,490)	(666,110)	(692,754)	(720,464)
Retail (NNN Leases)	0	0	0	0	0	0	0	0	0	0
Day Care	(371,527)	(382,673)	(394,153)	(405,978)	(418,157)	(430,702)	(443,623)	(456,932)	(470,640)	(484,759)
Residential (By Unit Owners)	(96,806)	(201,356)	(209,410)	(217,787)	(226,498)	(235,558)	(244,980)	(254,780)	(264,971)	(275,570)
Parking										
Subtotal	(721,427)	(1,110,465)	(1,151,057)	(1,193,158)	(1,236,825)	(1,282,116)	(1,329,094)	(1,377,821)	(1,428,365)	(1,480,793)
Less: Real Estate Taxes										
Office	(245,864)	(506,479)	(521,673)	(537,324)	(553,443)	(570,047)	(587,148)	(604,762)	(622,905)	(641,592)
Retail (NNN Leases)										
Day Care										
Residential (By Unit Owners)										
Parking										
Subtotal	(245,864)	(506,479)	(521,673)	(537,324)	(553,443)	(570,047)	(587,148)	(604,762)	(622,905)	(641,592)
Less: Land Lease - Base Rent										
Total Expenses	(968,691)	(1,616,944)	(1,672,730)	(1,730,478)	(1,790,268)	(1,852,163)	(1,916,242)	(1,982,583)	(2,051,270)	(2,122,385)
Income Before Debt Service	1,732,592	3,315,553	3,321,208	3,309,044	3,296,550	3,685,406	4,089,984	4,076,453	4,062,558	4,048,291
Less: Debt Service		(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)	(3,076,298)
Before Tax Cash Flow	1,732,592	239,255	244,910	232,745	220,252	609,108	1,013,686	1,000,155	986,260	971,993
Land Lease - Additional Rent	0	47,851	48,982	46,549	44,050	121,822	202,737	200,031	197,252	194,399
Before Tax Cash Flow to Developer	1,732,592	191,404	195,928	186,196	176,201	487,286	810,949	800,124	789,008	777,594







DE HUNTS - ADVANCE FINANCIAL SUPPORT - SOUTH END

Assumed Annual Rent Increase	4.00%	Assumed Annual Exp Increase	4.00%	Assumed Annual Tax Increase	3.00%													
Project Year	1	2	3	4	5	6	7	8	9	10	11	12	13					
Calendar Year	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000					
Total																		
INCOME AND EXPENSE TRACKING																		
Section 707 2 BR Rents	727	756	786	818	850	885	920	957	995	1,035	1,076	1,119	1,164					
Section 707 3 BR Rents	919	956	994	1,034	1,075	1,118	1,163	1,209	1,258	1,308	1,360	1,415	1,471					
Section 707 4 BR Rents	1,019	1,060	1,102	1,146	1,192	1,240	1,289	1,341	1,395	1,450	1,508	1,569	1,631					
Residential Operating Costs	(2,000)	(2,080)	(2,163)	(2,250)	(2,340)	(2,433)	(2,531)	(2,632)	(2,737)	(2,847)	(2,960)	(3,079)	(3,202)					
Day Care Operating Costs	(340,000)	(350,200)	(360,706)	(371,527)	(382,673)	(394,153)	(405,978)	(418,157)	(430,702)	(443,623)	(456,932)	(470,640)	(484,759)					
Transitional Housing Services	(550,000)	(572,000)	(594,880)	(618,675)	(643,422)	(669,159)	(695,925)	(723,762)	(752,713)	(783,821)	(814,134)	(846,700)	(880,568)					
SOURCES OF FUNDS																		
Loan Proceeds	8,000,000	5,299,315	2,700,685	0														
Housing Innov Fund / EDCD	360,000	360,000	0	0														
Developers Invested Capital	317,250	0	0	0														
B40 Section 705	1,200,000	1,200,000	1,200,000															
Sales Proceeds	7,395,300	1,648,825	5,546,475															
Park Square Project Surplus	3,498,139	3,092,982	405,157															
Project Cash Flow	0																	
TOTAL SOURCES	20,770,689	317,250	5,659,315	8,842,493	5,351,632													
USES OF FUNDS																		
Pre-Development	242,250																	
Land	300,000	300,000																
Construction Costs	10,755,900	4,302,360	5,377,950	1,075,590														
Non-Construction Expenses	1,847,490	738,996	923,745	109,749														
Interim Interest	1,625,049	317,959	691,973	615,118														
Construction Loan Release	6,000,000		1,848,825	4,151,175														
Operating Losses thru B/E	0																	
Return of Invested Capital	0																	
Profit - Developer	0																	
Profit - City of Boston	0																	
TOTAL USES	20,770,689	317,250	5,659,315	8,842,493	5,951,632													
REVENUES																		
Gross Income																		
Transitional Housing - Rent				389,779	405,370	421,585	438,448	455,986	474,226	493,195	512,922	533,439	554,777					
Transitional Housing - Grants				618,675	643,422	669,159	695,925	723,762	752,713	782,821	814,134	846,700	880,568					
Day Care - Grants, Fees				371,527	382,673	394,153	405,978	418,157	430,702	443,623	456,932	470,640	484,759					
Parking				0	0	0	0	0	0	0	0	0	0					
Total Gross Income				1,379,981	1,431,465	1,484,897	1,540,351	1,597,906	1,657,640	1,719,639	1,783,988	1,850,779	1,920,103					
Less: Vacancies (5%)				(71,573)	(74,245)	(77,018)	(79,895)	(82,882)	(85,982)	(89,199)	(92,539)	(96,005)	(99,605)					







Net Income	1,379,981	1,353,892	1,410,652	1,463,334	1,518,010	1,574,758	1,633,657	1,694,789	1,758,240	1,824,098
Less: Operating Expenses										
Transitional Housing - Operating Expenses	(80,990)	(84,230)	(87,599)	(91,103)	(94,747)	(98,537)	(102,478)	(106,578)	(110,841)	(115,274)
Transitional Housing - Social Services	(618,675)	(643,422)	(669,159)	(695,925)	(723,762)	(752,713)	(782,821)	(814,134)	(846,700)	(880,568)
Day Care	(371,527)	(382,673)	(394,153)	(405,978)	(418,157)	(430,702)	(443,623)	(456,932)	(470,640)	(484,759)
Parking										
Subtotal	(1,071,193)	(1,110,325)	(1,150,911)	(1,193,006)	(1,236,667)	(1,281,952)	(1,328,923)	(1,377,644)	(1,428,180)	(1,480,601)
Less: Real Estate Taxes										
Transitional Housing	0	0	0	0	0	0	0	0	0	0
Day Care	0	0	0	0	0	0	0	0	0	0
Residential (By Unit Owners)	0	0	0	0	0	0	0	0	0	0
Parking	0	0	0	0	0	0	0	0	0	0
Subtotal	0	0	0	0	0	0	0	0	0	0
Total Expenses	(1,071,193)	(1,110,325)	(1,150,911)	(1,193,006)	(1,236,667)	(1,281,952)	(1,328,923)	(1,377,644)	(1,428,180)	(1,480,601)
Income Before Debt Serv	308,789	249,567	259,741	270,328	281,344	292,807	304,734	317,145	330,060	343,497
Less: Debt Service		(212,158)	(212,158)	(212,158)	(212,158)	(212,158)	(212,158)	(212,158)	(212,158)	(212,158)
Before Tax Cash Flow	308,789	37,408	47,582	58,169	69,185	80,648	92,576	104,987	117,901	131,339







## 7.50 Condominium Sales

Condominium sales for both project components are summarized below. This data has been incorporated in the Sources and Uses statements above. The market rate unit sales figures for the Park Square site are based on current prices of units without frontage on the Public Garden at the Four Seasons and Heritage projects. The market rate unit sales figures for the South End site reflect current prices in that neighborhood.

For moderate-income units, the following assumptions helped determine potential sales prices:

Moderate Income (Family of four)	\$30,000
Per Cent of income available for housing	28%
Annual amount available for housing	8,400
Less: Real Estate Taxes	1,500
Less: Insurance	240
Less: Maintenance Charges	1,200
Balance available for Debt Service	5,460
Assumed Massachusetts HOP interest rate	5.50%
Approximate amount of mortgage	80,000
Add: 5% down payment	4,000
Approximate average sales price per unit	84,000

### =====

#### CONDOMINIUM SALES - PARK SQUARE

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	Number Of Units	Avg Price Per Net SF	Avg Price Per Unit	Total Sales
-----				
Unit Sales				
Market Rate Units	131	350	369,600	48,417,600
Moderate-income	15	80	84,480	1,267,200
	-----			-----
Subtotal	146			49,684,800
Parking Sales				
Market Rate Units	175		50,000	8,740,000
Moderate-income	15		0	0
	-----			-----
Subtotal	190			8,740,000
Total Sales Proceeds				58,424,800

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CONDOMINIUM SALES - SOUTH END

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	Number Of Units	Avg Price Per Net SF	Avg Price Per Unit	Total Sales
-----				
Unit Sales				
Transitional	36	0	0	0
Moderate-income	24	80	79,200	1,900,800
Market-rate	30	185	183,150	5,494,500
	-----			-----
Subtotal	54			7,395,300
Parking Sales				
Transitional	9		0	0
Moderate-income	24		0	0
Market-rate	30		0	0
Support Services	7		0	0
	-----			-----
Subtotal	70			0
Total Sales Proceeds				7,395,300

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7.60 Stabilized Operating Pro Formas

7.61 Stabilized Operating Pro Forma - Park Square - 1992

This table summarizes a stabilized year of operation of the commercial portion of the Park Square project which will be owned and operated by the developer. The philosophy of The South Park Partnership is to develop quality projects and hold and manage them over the intermediate to long term as continuing investments. It has been assumed that no rent will be charged to the Daycare Center and that the expenses of this facility will be matched by its revenues (fees, government assistance, and contributions from a charitable endowment to be established by the development team from a portion of the proceeds of the sale of condominium units). The Partnership has no interest in receiving income from this project component.

The Pro Formas also compute the amount of the mortgage that is supportable by this project component. This figure has been incorporated into the Sources and Uses of Funds statement. Note that the Land Lease payment includes the base payment of \$25,400 annually plus an additional payment equal to approximately 20% of this project component's net operating income after debt service, after a 13% priority return to the developer. 20% of the developer's profit upon refinancing or sale of the Park Square component will also be part of the Additional Rent Payment.







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STABILIZED OPERATING PRO FORMA - PARK SQUARE - 1992

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Construction Loan Interest	10.00%
Mortgage Interest	10.00%
Assumed Debt Service Coverage	1.15
Assumed Supportable Mortgage	29,000,000

=====

	Total	Per Unit
Gross Income		
Office	3,097,875	35.10 Per SF
Retail	883,468	40.95 Per SF
Day Care--Grants, Fees	382,673	7,653 Per Child
Residential	0	
Parking	836,402	263.22 /Space/Mo
Total Gross Income	5,200,419	
Less: Vacancies (5%)	(260,021)	
Add: Expense Reimb	17,500	
Net Income	4,957,897	
Less: Operating Expenses		
Office	(526,436)	(5.85) Per SF
Retail (NNN Lease)	0	0 Per SF
Day Care	(382,673)	(7,653) Per Child
Residential (By Owner)	0	0.00 Per SF
Parking	(201,356)	(2.34) Per SF
Less: Real Estate Taxes		
Office	(506,479)	(5.63) Per SF
Retail (NNN Lease)	0	0.00 Per SF
Day Care	0	0.00 Per Child
Residential (By Owner)	0	0.00 Per SF
Parking	0	0.00 Per SF
Less: Land Lease--Base	(25,400)	1.00 Per SF land
Total Expenses	(1,642,344)	
Income Before Debt Serv	3,315,553	
Less: Debt Service	(3,076,298)	
Before Tax Cash Flow	239,255	
Land Lease - Addtl Rent	47,851	
Cash Flow to Developer	191,404	

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## 7.62 Stabilized Operating Pro Forma - South End - 1992

This table summarizes a stabilized year of operation of project components that are not sold to individual condominium unit owners.

The Pro Forma also computes the amount of the mortgage that is supportable by this project component, assuming that rent is paid for the transitional units under the Commonwealth of Massachusetts Chapter 707 program.

STABILIZED OPERATING PRO FORMA - SOUTH END -1992		
Construction Loan Interest	10.00%	
Mortgage Interest	10.00%	
Assumed Debt Service Coverage	1.15	
Assumed Supportable Mortgage	2,000,000	
	Total	Unit Guides
Gross Income		
Transit Hsg - Rent	405,370	11,260 Per Unit
Transit Hsg - Grants	643,422	17,873 Per Unit
Day Care--Grants, Fees	382,673	7,653 Per Child
Parking	0	0 /Space/Mo
Total Gross Income	1,431,465	
Less: Vacancies (5%)	(71,573)	
Net Income	1,359,892	
Less: Operating Expenses		
Transit Hsg - Oper Exp	(84,230)	(2,340) Per Unit
Transit Hsg - Soc Serv	(643,422)	(17,873) Per Unit
Day Care	(382,673)	(7,653) Per Child
Parking	0	0 /Space/Mo
Less: Real Estate Taxes		
Transitional Housing	0	
Day Care	0	
Residential (By Owner)	0	
Parking	0	
Total Expenses	(1,110,325)	
Income Before Debt Serv	249,567	
Less: Debt Service	(212,158)	
Income After Debt Serv	37,408	







## 7.70 Summary of Plan for Project Financing

The following tables summarize the mortgage amounts that can be assumed using commonly accepted rules for loan underwriting. The assumed mortgage amount plus any other sources of funds are then compared to development costs to determine a theoretical surplus (deficit) of funds for each project component. This theoretical surplus (deficit) will not equal the actual surplus (deficit) which depends on the timing of available funds. We estimate the deficit from the South End component at around \$3.5 million (see Sources and Uses of funds statement). No assumption has been made regarding equity participation by a lender, although this alternative will be explored by the developer and is acceptable to the Partnership.

It is clear from the analysis of the Park Square project component that \$75,000,000 in borrowed funds could theoretically be obtained. this exceeds the total development cost of \$69,000,000 and the project requirement of \$54,000,000 in borrowed funds. Assuming that a lending institution would authorize assignment of these funds to the South End project component, we can develop this alternate source of money for the South End project deficit should the timing of available funds from the Park Square project component for the funding of this deficit fail to correspond to the timing of the deficit.

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### FINANCING SUMMARY - PARK SQUARE

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Total Sales Proceeds	58,424,800
Loan to Value Ratio	80%
Loan supportable by condominium component	46,739,840
Add: Mortgage supportable by office/retail component	29,000,000
Total supportable loan	75,739,840
Total development costs	69,060,426
Theoretical funds surplus (deficit)	6,679,414

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Note: See Sources and Uses of Funds Statement for funds over time.







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FINANCING SUMMARY - SOUTH END

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Total Sales Proceeds	7,395,300
Loan to Value Ratio	80%
<hr/>	
Loan supportable by condominium component	5,916,240
Add: Mortgage supportable by rental housing	2,000,000
<hr/>	
Total supportable loan	7,916,240
Government and Private Grants	1,560,000
Total development costs	14,770,689
<hr/>	
Theoretical funds surplus (deficit)	(5,294,449)

---

Note: See Sources and Uses of Funds Statement for funds over time.

A simplified return to the developer is shown in the table below. Profits (losses) for each project component (taken from the Sources and Uses of Funds statements) are listed with contributions by the developer into a charitable endowment to be established to provide a portion of the ongoing operating costs for the transitional housing units and day care facilities. The overall return to the developer based on these profits (losses) and commitments is then computed.

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RETURN TO DEVELOPER - TOTAL PROJECT

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Park Square Net Before Tax Profit (Loss)	12,385,696
South End Net Before Tax Profit (Loss)	(317,250)
<hr/>	
Total Net Before Tax Profit (Loss) before Deductions	12,068,446
Less: Endowment for Transitional Housing and Day Care	(2,000,000)
<hr/>	
Total Net Before Tax Profit (Loss)	10,068,446
<hr/>	
Overall Return	12.01%

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In summary, The South Park Partnership intends to finance the project using conventional funds from local or national banks or insurance companies. Existing federal and state programs are utilized to partially defray the initial development costs of below-market project components and to assist in funding operating expenses. The City of Boston assists the project by contributing land it owns at a price substantially below market and minimizing taxes on social service facilities. Interest rate assumptions have been indicated in the tables and we have assumed that acceptable marketing studies and appraisals can be obtained.















8.00 EXHIBITS







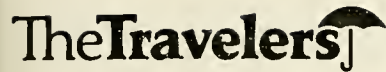
#### 8.10 Financial Institutions Letters of Interest

We are including letters of interest for financial institutions and continue to pursue additional funding sources. Additional letters will be forwarded upon receipt.









**Ernest F. DesRochers**  
General Manager  
Real Estate Investment Department

The Travelers Companies  
200 State Street  
P.O. Box 812  
Boston, MA 02103  
Telephone: 617 330-1255

Mr. Jay Schochet  
Schochet Associates  
720 Statler Building  
Boston, Ma 02116

November 4, 1987

Dear Jay:

Kevin Phelan of Meredith & Grew called me recently to discuss financing your proposed Park Square project in the South End of Boston. As I understand the proposal, a group which you are a part would like to construct a mixed-use development which will consist of approximately 146 condos, 90,000 sf of first class office space, 22,000 sf of retail space, and garage parking for 265 cars.

We would look forward to further reviewing your proposal and considering providing the financing for the development. The project is obviously complicated and will take a considerable amount of time to accomplish your objective. I know you understand that in no means is this letter a commitment of the part of The Travelers as all of our investments are subject to the approval of Travelers Investment Committee. However, we have enjoyed working with you and your firm in the past and were pleased that we were able to provide permanent financing for your Cambridge property earlier this year.

We look forward to continuing our relationship with you and are looking forward with interest to review the project in greater detail as your group makes its way through the City of Boston approval process. Keep us informed of the status.

I hope all is well. Let's get together soon at a mutually convenient time.

Best Regards,

Ernest F. DesRochers









## BANK OF NEW ENGLAND

November 5, 1987

Mr. Charles T. Grigsby  
The South Park Partnership  
720 Statler Office Building  
Boston, MA

Re: Parcel Linkage #2

Dear Mr. Grigsby:

We were interested to learn of your plans to join a team consisting of Jay Schochet and Associates, Meredith & Grew, Northeast Management, Feaster Enterprises and Samuel Mintz to submit a proposal to the BRA for the second parcel to parcel project.

As we understand your plans, the project consists of retail, offices and 146 condominium units at the Park Square site. You are providing 265 parking units as well as a day care facility at that site.

The South End location will be a mix of transitional units, moderate income sale units and market rate condominiums.

The development process is a long one, and we would like to be kept abreast of your progress. When you are close to tentative designation, we would be pleased to discuss your plans in detail to learn of your financing needs.

You appreciate that this does not constitute a commitment of the bank at this time. Good luck in the process.

Sincerely,

James M. Sweeney  
Senior Vice President

JMS:set







## 8.20 Schochet Associates - Financial References

State Street Bank and Trust Company 225 Franklin Street	Mr. Wayne Johnson 654-3691
Coolidge Bank and Trust Company 75 Arlington Street Boston, Massachusetts 02116	Mr. John Dwinell 556-0400
Bank of New England 28 State Street Boston, Massachusetts 02109	Mr. Mark Hargrove 722-6400
Bank of New York 48 Wall Street	Mr. Michael Katos 212-530-3976
Boston Trade Bank Ten Post Office Square Boston, Massachusetts 02109	Mr. John Marston 556-2038
Boston Five Cents Savings Bank Ten School Street Boston, Massachusetts 02108	Mr. Daryl S. Smith Mr. Jock Hosmer 742-6000
Bank of Newport Ten Washington Street Newport, Rhode Island 02840	Mr. Peter Damon 401-846-3400







### 8.30 Development Team Resumes







SCHOCHET ASSOCIATES







## SCHOCHET ASSOCIATES

Schochet Associates is a privately owned real estate development and management company headquartered in Boston, Massachusetts.

Established in 1973, Schochet Associates offers its clients the diverse services necessary to complete new construction and/or rehabilitation of residential and commercial programs from initial site selection through completed facilities ready for occupancy.

Over the years, the Company has endeavored to create developments of significant investment value, many of which have been retained in the Company's portfolio and are managed by Federal Management Co., Inc., its management affiliate.

Schochet Associates maintains the following capabilities: research and feasibility analysis; land or building acquisition; engineering/design/construction supervision; and financing, management, and marketing services.

Schochet Associates' major areas of concentration are the construction or rehabilitation of properties for rental housing, condominiums, and office buildings. The Company has also developed shopping centers, residential communities, and multi-use complexes.







Under the umbrella of Schochet Associates are operating groups, each with its own separate and distinct function, the combination of which comprises a complete real estate development and management company. Schochet Associates provides highly sophisticated development skills. JRS Equities, Inc. provides expertise in acquisition and financing; Federal Management Co., Inc. offers years of experience and expertise in commercial, retail and residential property management; and the Financial Services and Data Processing Department delivers all the financial data required to service all these divisions utilizing the most up-to-date computer systems and sophisticated software, custom-designed to integrate all of the company's functions.

Schochet Associates is a diversified company, with projects throughout Massachusetts, Maine, Rhode Island, Connecticut, Georgia, California, and the State of Washington. Its experience encompasses the construction of large mixed-use condominium developments, rehabilitation of historic buildings, and new construction of rental housing and commercial space. The Company has succeeded with a wide variety of projects, including the new construction of luxury condominiums in Newport, Rhode Island; government-assisted housing in Portland, Maine; the rehabilitation into housing units of a landmark, granite cotton mill in Whitinsville, Massachusetts; and the reconstruction of an industrial warehouse into a first class office building in Cambridge, Massachusetts. We are proud that one of our projects garnered an architectural award for excellence, and that we are considered to be the leading real estate development company in Newport, Rhode Island.







Because of the scope of Schochet Associates' projects, and the importance of the equity component in real estate investments, JRS Equities, Inc. was structured to create and administer wholesale or retail real estate syndications and to act as the acquisition arm of Schochet Associates. The Company maintains relationships with major regional and national investment houses and provides Schochet Associates with strong expertise in the continually evolving real estate investment market.

Federal Management Co., Inc., has regional offices in Newport, Rhode Island, Atlanta, Georgia, Los Angeles, California, and Seattle, Washington. These offices provide management services for all Schochet Associates' developments and acquisitions. Managing these assets involves a wide range of responsibilities. These include leasing activities, cash flow projections, tenant relations, personnel administration, insurance and real estate tax matters, accounting functions, and building operations.

Its residential portfolio includes all types of housing, from luxury condominiums to low and moderate subsidized rental units, new construction and rehabilitation as well as market rate rental apartment units. Its commercial portfolio comprises offices and stores, shopping malls, restaurants, and old and new office buildings.







Schochet Associates, JRS Equities and Federal Management Co. are supported by a first-class in-house Financial Control and Data Processing Department. The staff consists of highly trained experts utilizing sophisticated computer equipment. They handle all financial matters generated from the development and management of Schochet Associates' residential and commercial properties, including financial analyses, cost and sales projections, contractor requisition payments, as well as all property management fiscal affairs. This Department utilizes a network computer system that electronically connects each property location with the main office providing information in "real time" to each property location and regional office.







Key Personnel of Schochet Associates and  
JRS Equities, Inc.

JAY R. SCHOCHET

In 1973, following several years in the Boston real estate community, most significantly as Managing Partner and subsequently President of The Codman Company, Inc., he formed his own real estate development company - Schochet Associates. Under these auspices he has concentrated on the development and management of projects throughout New England and California. In every instance he acts as a principal. He has had many years of experience in building all types of housing, from apartments for the elderly to luxury condominiums, as well as industrial and commercial structures, and large office buildings. He is equally comfortable with rehabilitation or new construction, conventionally financed or government subsidized projects.

In addition to Schochet Associates, Mr. Schochet formed Federal Management Co., Inc., which specializes in the management of commercial and residential property. Together, Schochet Associates and Federal Management Company, Inc. constitute a well-rounded, totally experienced real estate development and management team able to offer each project the skill and expertise so necessary in today's competitive market.

In 1983, he organized JRS Equities, Inc. to act for Schochet Associates in the acquisition of income producing properties in growing markets nationwide. JRS Equities has recently acquired for Schochet Associates, properties in Atlanta, Georgia and Seattle, Washington.

Mr. Schochet graduated from Dartmouth College. He is a member of the Greater Boston Real Estate Board, the Rhode Island Real Estate Board, the National Association of Home Builders, the National Association of Realtors, and the Chambers of Commerce of Boston and Newport, Rhode Island.

GILLIAN R. GATTIE

Gillian Gattie has been associated with Jay Schochet since 1968, when she joined him at Wm. C. Codman & Son. Educated in England, she majored in English, French, and Business. She is President of JRS Equities, Vice President-Administration of Schochet Associates, and a Vice President and Secretary of Federal Management Co., Inc.







#### PETER A. LEWIS

Peter A. Lewis joined Schochet Associates in 1984. He is responsible for the company's development program and has experience in pre-development and project management activities involving both new construction and the reuse of existing structures. Prior to joining Schochet Associates, Mr. Lewis worked for Urban Investment and Development Company, and was primarily associated with the \$525 million mixed-use Copley Place development which opened in Boston in 1984. Mr. Lewis was also involved in the planning of 900 North Michigan Avenue, a mixed-use tower under construction in Chicago.

Before relocating to Boston, Mr. Lewis was employed in New York by Helmsley-Spear and was responsible for project management for the Helmsley Palace and New York Helmsley hotels. He also has background as a real estate loan officer and is a Registered Architect. Mr. Lewis holds degrees in Architecture from Harvard University and Illinois Institute of Technology, as well as an MBA from New York University.

#### DAVID GROSSMAN

David Grossman graduated Summa Cum Laude from the University of Rhode Island in 1977, receiving a B.S. Degree in Business Administration, majoring in Accounting. He is a Certified Public Accountant. He worked with Touche Ross and Co. for five years becoming a Senior Auditor specializing in the construction, manufacturing and retail industries. In 1982, he became Controller of Harvest Markets Companies, a supermarket chain, in charge of all accounting, EDP and financial functions of seven locations. He joined Schochet Associates in September 1984, as Controller, and has full responsibility for all financial matters and accounting procedures for the Company. He is Treasurer of Federal Management Co. and JRS Equities, Inc.

#### DANIEL J. MCSWEENEY

Daniel McSweeney graduated from Harvard University in 1958 and continued his graduate studies in Economics at New York University. He began his career as a City Planner, became Director of Planning and Renewal for two engineering consulting firms, and eventually Director of Development for the City of Cambridge. Prior to joining Schochet Associates in 1982 he was a real estate development consultant for several years, specializing in the packaging of projects, their financing, and syndication. As Project Manager for Schochet Associates, he is responsible for the Company's developments throughout Rhode Island and Connecticut which currently include an office park, luxury condominiums, and a mixed-use downtown rehabilitation.







#### CARL J. BONTA

Carl Bonta joined Schochet Associates in 1986 as an Assistant Acquisition Specialist. He received his B.S. in Engineering from Tufts University in 1980 and spent three years as an Applications and Marketing engineer for an international firm. He then attended M.I.T.'s Sloan School of Management and received an M.S. in Management Science after which he worked as a consultant to M.I.T. and IBM on international marketing of information systems technology.

#### RICHARD J. HENKEN

Richard Henken joined Schochet Associates on a permanent basis in 1987 following an internship as an Assistant Acquisition Specialist during the summer of 1986. Mr. Henken received both his Bachelors and Masters degrees in Economics from Tufts University and an M.S. in Management Science with concentrations in Marketing and Finance from M.I.T.'s Sloan School of Management. Prior to attending the Sloan School, Mr. Henken worked as a financial economist for a major money center bank, and an international publishing company. Before joining Schochet Associates, he worked as a specialist in marketing and business strategy for a major management consulting firm.

#### MICHAEL J. MAGNER

Michael Magner joined Schochet Associates in 1987 as an Assistant Acquisition Specialist. He received his B.S. in Management with a concentration in finance from the University of Massachusetts in Boston in 1987. He was active as a property manager in the Boston area and has worked as a consultant to development and property management companies on optimizing management information systems and control.







Key Personnel of  
Federal Management Company, Inc.

JASON J. TIMMONS

Jason Timmons is President of Federal Management Co., Inc. and has overall responsibility for the operation and administration of the Company's portfolio of residential units and commercial developments. He has had many years of experience in the real estate field, with a broad knowledge of federal and state housing subsidy programs. He graduated from Brandeis University and attended Boston University and Northeastern University to continue his real estate education. He has been awarded the professional designation of Certified Property Manager (CPM). He is a member of the Greater Boston Real Estate Board, a member of the Institute of Real Estate Management, a past Director of the Rental Housing Association, and a member of the Subsidized Housing Committee of the Builders Association of Greater Boston.

BETTE J. ANDERSON

Bette Anderson is a Vice President of Federal Management Co., Inc. and is responsible for the portfolio of all residential units. She graduated from the University of Connecticut in 1972 and commenced her business career with the company immediately thereafter. She also attended Boston College to achieve her Masters Degree in Business Administration. She has been awarded the professional designation of Certified Property Manager (CPM). She is a member of the Greater Boston Real Estate Board and a member of the Rental Housing Association.







SCHOCHET ASSOCIATES

PROJECTS IN PROGRESS

Long Hill Woods  
Groton, Connecticut      324 garden apartments on a 35 acre site in  
Groton. Construction is scheduled to begin  
in late 1987.

595 Massachusetts Ave.  
Central Square  
Cambridge, MA      82 residential units with 15,000 sq.ft. of  
first floor retail, 30,000 sq.ft. of office  
space, and a 145-car garage on a one acre  
site on Massachusetts Avenue in Cambridge.  
The site is assembled and construction  
should commence in 1988.

South Park Urban  
Renewal,  
Los Angeles, CA      One of three principal developers of the  
"South Park Consortium" designated as the  
preferred developer for three city blocks  
fronting on Olympic Boulevard in downtown  
Los Angeles. The program calls for 2000  
units of housing, 750,000 square feet of  
office space, 450,000 square feet of  
commercial space, 4000 parking spaces and 2  
museums, one of which will be The Children's  
Museum of LA.







SCHOCHET ASSOCIATES

PROJECTS OWNED

Danforth Heights  
Portland, Maine

A 166 unit apartment project located on an urban renewal site in Portland, Maine, developed under Section 236 of the National Housing Act. The project was constructed in 1971.

Waterview Apts  
South Boston, Mass

A 49 unit elderly housing project located in South Boston financed by the Massachusetts Housing Finance Agency with rental assistance payments under the Section 8 program. The project was constructed in 1975 and has enjoyed full occupancy since opening.

Cotton Mill Apts  
Whitinsville, Mass

A 55 unit apartment project generated from the rehabilitation of an old granite cotton mill in Whitinsville, Massachusetts. The project was financed by the Massachusetts Housing Finance Agency with rental assistance payments under the Section 8 program.

Brick Market Place I  
Newport, Rhode Island

84 luxury condominium units combining residential, retail and office space in three buildings on the waterfront of Newport, Rhode Island. This downtown urban renewal project was the catalyst for the revitalization of the waterfront, and has received an architectural award for excellence. It was constructed in 1974.

Brick Market Place II  
Newport, Rhode Island

Constructed adjacent to the initial 84 units of Brick Market Place I, it continued the architectural theme. The project consists of 8 stores, 4 offices and a large, high quality restaurant.

Weldon Apartments  
Greenfield, Mass

105 units of housing for the elderly generated from the rehabilitation of the historic Weldon Hotel.







<p>One Alewife Place Cambridge, Mass.</p> <p>West Broadway Newport, Rhode Island</p> <p>De La Salle Condominiums Newport, Rhode Island</p> <p>Garfield Building Los Angelus, California</p> <p>Angelus Plaza Los Angeles, California</p> <p>Decatur North Professional Medical Building Decatur, Georgia</p> <p>La Paloma Apartments Seattle, Washington</p> <p>Somerset Green Seattle, Washington</p> <p>Fresh Pond Apartments Cambridge, Massachusetts</p>	<p>A first class office building reconstructed from an industrial building which had housed a manufacturing plant. The building contains 133,585 sq.ft. located on a 2 1/2 acre site.</p> <p>A mixed use, downtown redevelopment consisting of 115 elderly and family housing units, and 21,000 sq.ft. of commercial space.</p> <p>38 luxury condominium units generated from the rehabilitation of the De La Salle Academy.</p> <p>12 story office building located in downtown Los Angeles, listed on the National Historic Register. The building was totally renovated and restored into a first-class office building. Construction was started in late spring of 1983 and completed in June, 1984.</p> <p>1098 units of housing for the elderly located in the Bunker Hill Urban Renewal area in downtown Los Angeles. The project was acquired in 1984 after raising \$27,500,000 in equity by Private Placement managed by Drexel Burnham Lambert.</p> <p>10 story, 90,000 sq.ft. office building adjacent to Decatur North General Hospital in a suburb of Atlanta, acquired in April, 1986. The building is being completely refurbished and has received a new solar screen covering to upgrade its market quality and increase its energy efficiency.</p> <p>126 units of garden apartments completed and occupied in 1986 in a suburb of Seattle, Washington (Burien, WA).</p> <p>101 luxury garden apartments in Bellevue (a suburb of Seattle).</p> <p>504 apartment units constructed in 1968 and financed under the HUD 221(d)3 program. This project was awarded a Flexible Subsidy Program in 1983.</p>
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Riverwood Apartments      336 unit garden apartment complex  
Kent, Washington

Lake Meridian Apartments 175 unit apartment complex  
Kent, Washington

Chambers Creek Apts      433 unit apartment complex  
Tacoma, Washington







DEVELOPMENT EXPERIENCE  
JAY R. SCHOCHET

Danforth Heights Portland, Maine	Builder/Developer 166 unit apartment project
Thayer Garden Apartments Waterville, Maine	Builder/Developer 96 unit apartment project
Waterview Apartments South Boston, Massachusetts	Builder/Developer 49 unit elderly apartments
Cotton Mill Apartments Whitinsville, Massachusetts	Builder/Developer 55 unit rehabilitated apartment project
Brick Market Place I Newport, Rhode Island	Builder/Developer 84 luxury condominiums, and 26,500 sq.ft. of commercial space
Brick Market Place II Newport, Rhode Island	Builder/Developer 19,611 sq.ft. of commercial space
Weldon Apartments Greenfield, Massachusetts	Builder/Developer 105 unit rehabilitated elderly apartments
One Alewife Place Cambridge, Massachusetts	Builder/Developer 133,585 sq.ft. reconstructed commercial space
West Broadway Newport, Rhode Island	Builder/Developer 115 elderly/family units and 21,000 sq.ft. of commercial space
De la Salle Condominiums Newport, Rhode Island	Builder/Developer 38 luxury condominium units
Garfield Building Los Angeles, California	Owner/Developer 12 story, 100,000 sq.ft. renovated office space
Norstin Apartments Cambridge, Massachusetts	Owner/Developer 32 unit rehabilitated apartments







PROJECTS COMPLETED BY JAY R. SCHOCHET PRIOR TO THE  
FORMATION OF SCHOCHET ASSOCIATES

The Colonial Handbag Building Natick, Massachusetts	Builder/Developer 10,000 sq.ft. of office and warehouse space.
Sage Laboratories Natick, Massachusetts	Owner/Builder/Developer 35,000 sq.ft. of research and development and office space.
G. S. Pacetti Company North Reading, Massachusetts	Builder/Developer 10,000 sq.ft. of manufacturing space.
International Rubber Company Avon, Massachusetts	Builder/Developer 60,000 sq.ft. of office and warehouse space.
New England Nuclear Billerica, Massachusetts	Builder/Developer 10,000 sq.ft. laboratory space
State Street Bank Building Boston, Massachusetts	Developer/Consultant 800,000 sq.ft. office building
The Keystone Building Boston, Massachusetts	Developer/Consultant 600,000 sq.ft. office building
Flat Iron Shopping Center Manchester, New Hampshire	Developer 80,000 sq.ft. shopping center.
60 Leonard Street Belmont, Massachusetts	Owner/Developer 8,000 sq.ft. store block.
180 Beacon Street Boston, Massachusetts	Developer/Consultant 130 luxury high rise apartment units.
Westminster/Willard Place Boston, Massachusetts	Developer/Consultant 260 units of low and moderate income housing.







DEVELOPMENT EXPERIENCE  
PETER A LEWIS

Copley Place  
Boston, Massachusetts

Developer's Representative  
\$525 million mixed-use development including two hotels, 800,000 sq.ft. of office space, 250,000 sq.ft. of retail space and 100 apartments built on turnpike and railroad air rights.

900 North Michigan  
Chicago, Illinois

Developer's Representative  
\$200 million mixed-use development including a hotel, 250,000 sq.ft. of retail, 500,000 sq.ft. of offices and 250,000 sq.ft. of condominiums

The Helmsley Palace  
New York, New York

Developer's Representative  
1,200 room luxury hotel

The New York Helmsley Hotel  
New York, New York

Developer's Representative  
1,000 room luxury hotel

The Palace Condominium  
Miami, Florida

Developer's Representative  
250 unit luxury condominium

Long Hill Woods  
Groton, Connecticut

324 unit multifamily housing project scheduled to begin construction in late 1987

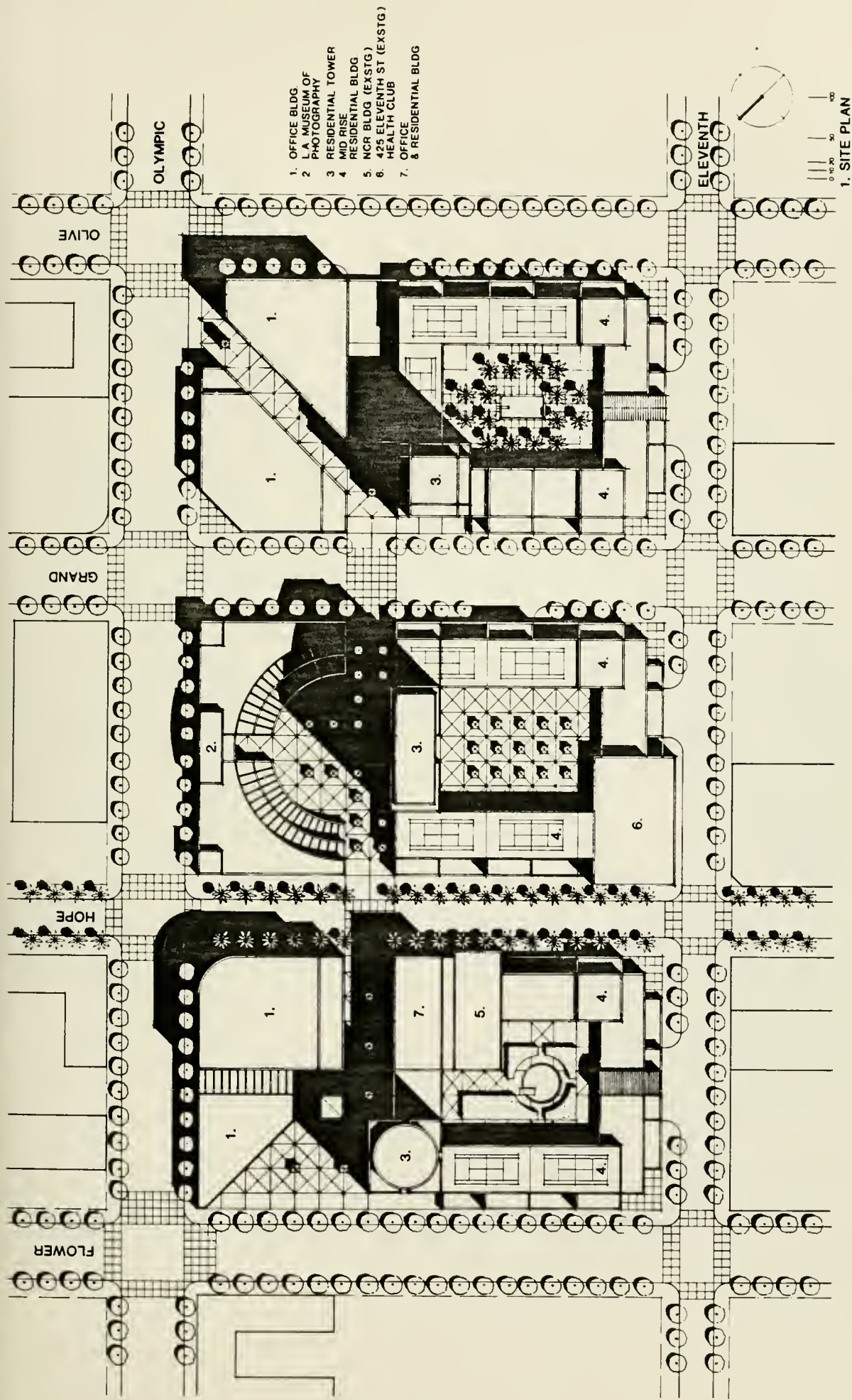
595 Massachusetts Avenue  
Cambridge, Massachusetts

Mixed-use retail, office and residential building proposed for construction in 1988.









# S O U T H P A R K LOS ANGELES, CALIFORNIA

THE SOUTH PARK CONSORTIUM,  
CHARLES KOBER ASSOCIATES/LOS ANGELES

1. OFFICE BLDG
2. L.A. MUSEUM OF PHOTOGRAPHY
3. RESIDENTIAL TOWER
4. MID RISE RESIDENTIAL BLDG
5. NCR BLDG (EXSTG)
6. 425 ELEVENTH ST (EXSTG)
7. HEALTH CLUB
8. OFFICE & RESIDENTIAL BLDG

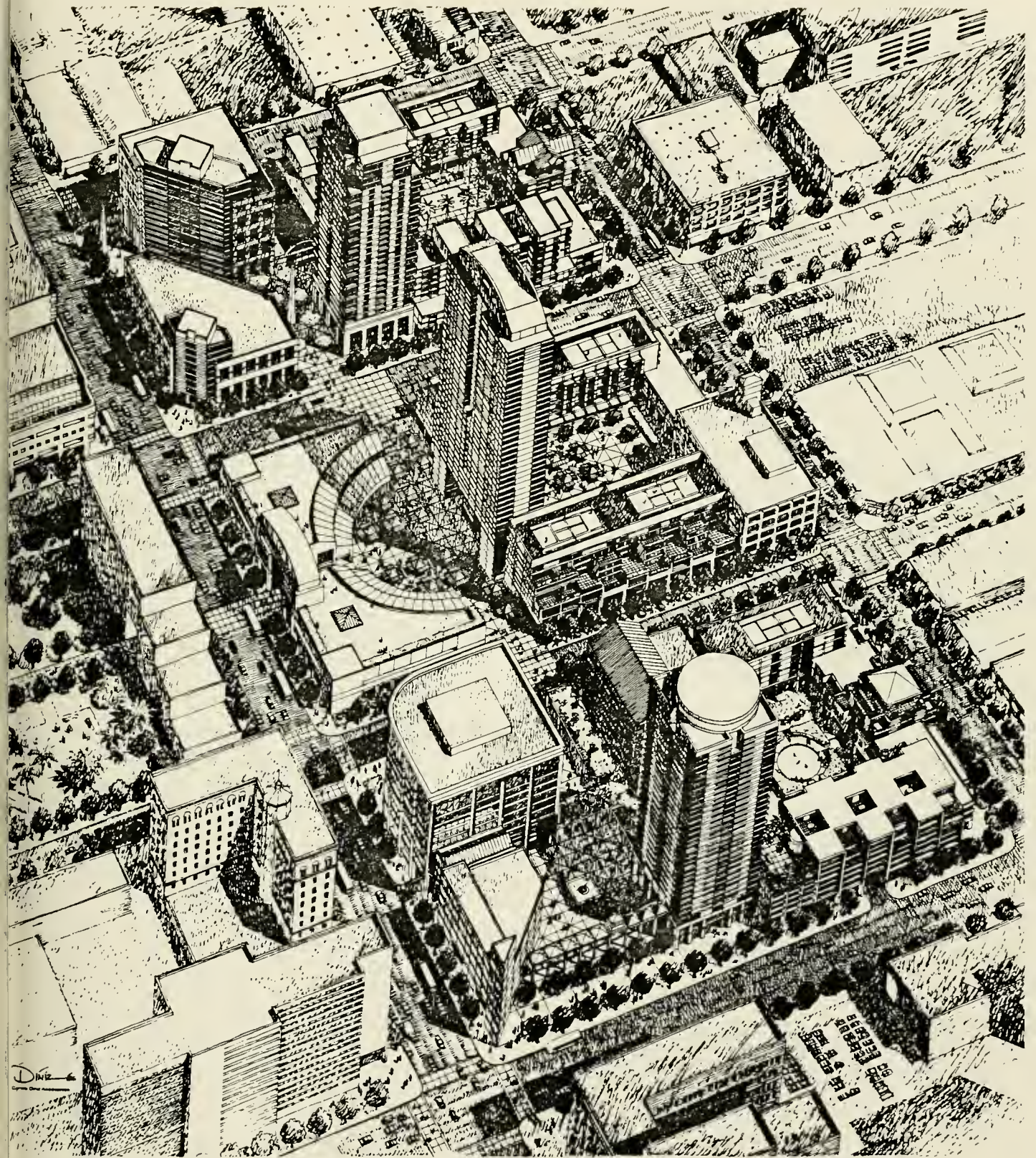


0 10 20 30  
1. SITE PLAN







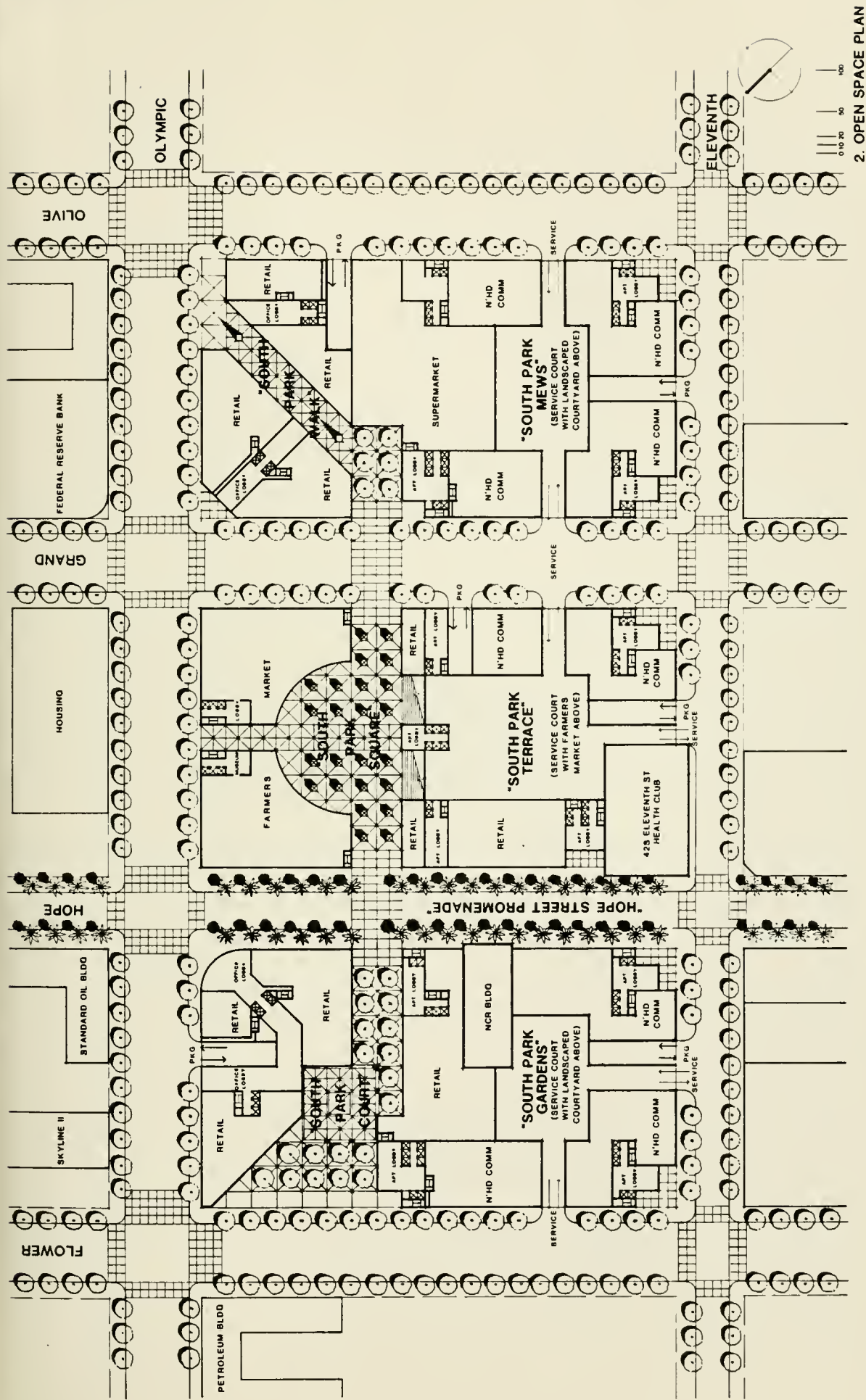


DINEZ  
Creative Director









# SOUTHERN PARK

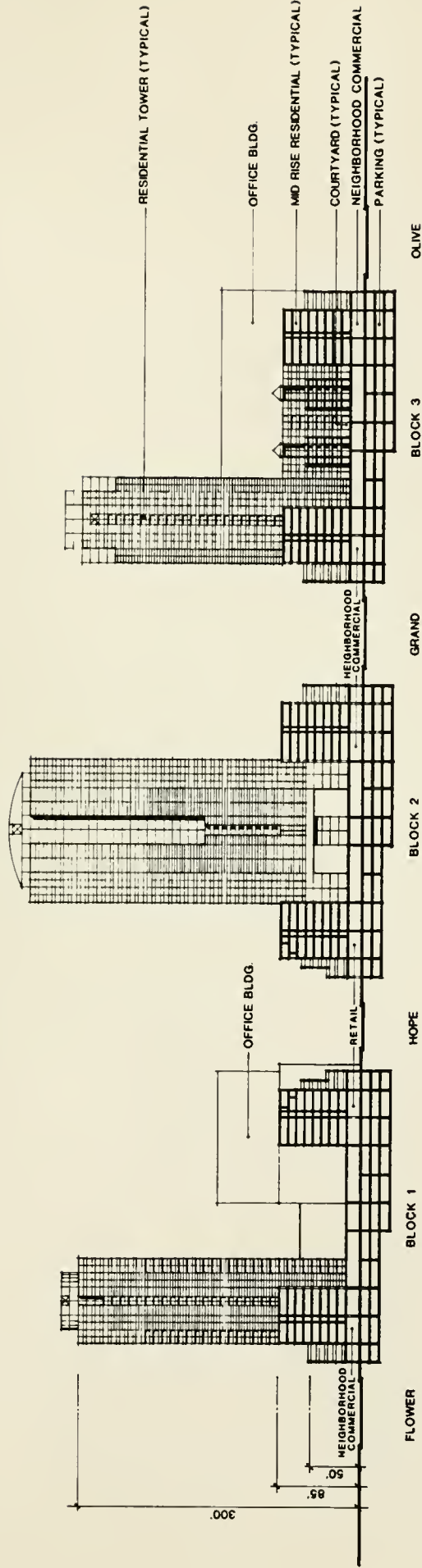
LOS ANGELES, CALIFORNIA

THE SOUTH PARK CONSORTIUM,  
CHARLES KOBER ASSOCIATES/LOS ANGELES









0 50 100  
feet

3. E-W SECTION AT  
CENTER OF SITE

# S O U T H P A R K

LOS ANGELES, CALIFORNIA

THE SOUTH PARK CONSORTIUM  
CHARLES KOBER ASSOCIATES/LOS ANGELES









Elevation: Essex Street

595 MASSACHUSETTS AVENUE  
CAMBRIDGE MASSACHUSETTS

STUDIO OF ARCHITECTURE  
STUDIO OF ARCHITECTURE  
STUDIO OF ARCHITECTURE









THE GARFIELD BUILDING  
Los Angeles, California









— COTTONMILL APARTMENTS —  
Whitinsville, Massachusetts —









BRICK MARKET PLACE  
Newport, Rhode Island









— ONE ALEWIFE PLACE —  
Cambridge, Massachusetts









— ANGELUS PLAZA —  
Los Angeles, California



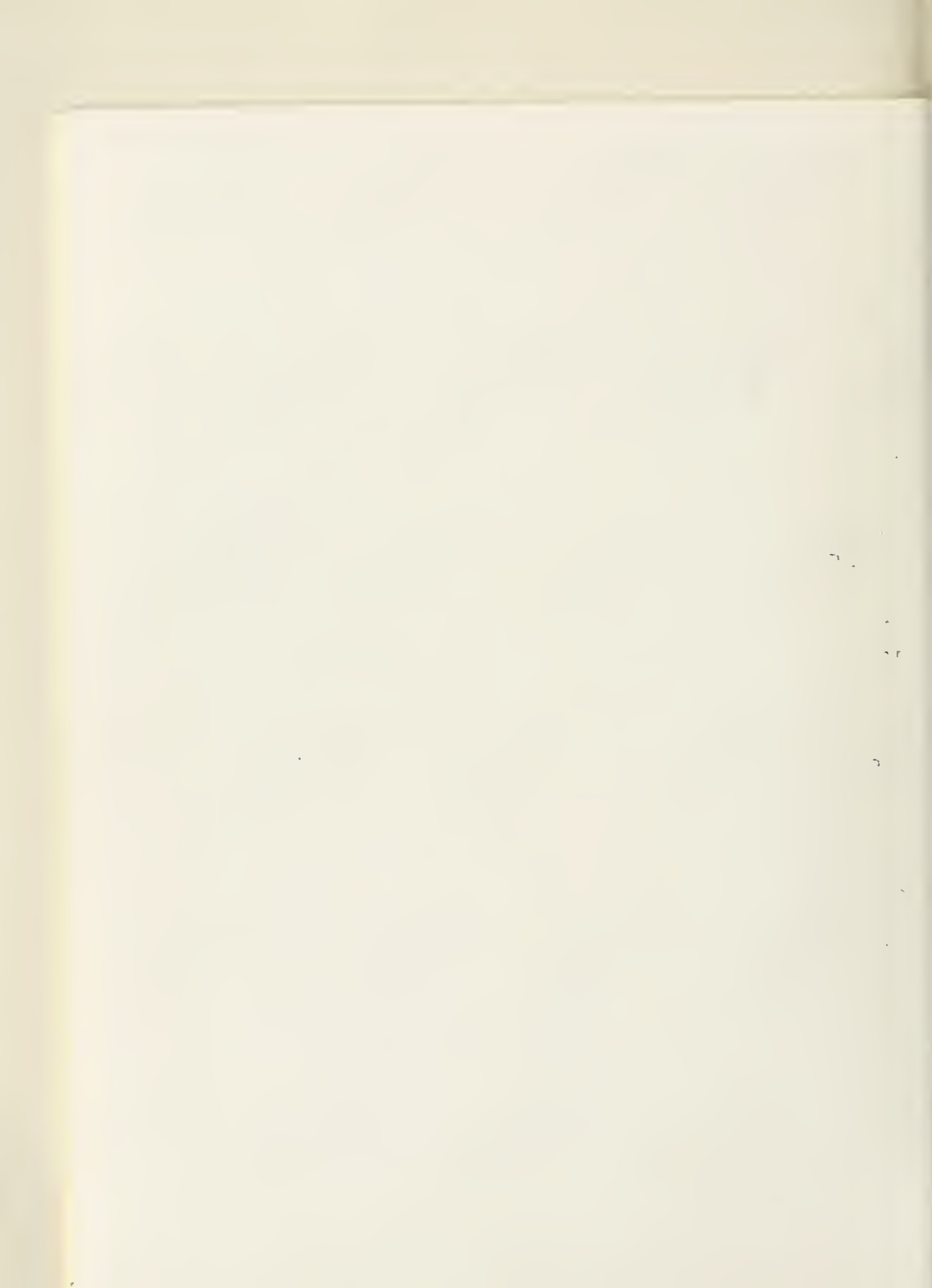






— SOMERSET GREEN APARTMENTS —  
Kent, Washington







JOSEPH D. FEASTER, JR., ESQUIRE  
51 Elmore Street  
Roxbury, Massachusetts 02119

EDUCATION:

John F. Kennedy School of Government, Harvard University, Senior Executive Program, June, 1984;  
Northeastern University School of Law, J.D. received June, 1975;  
Northeastern University, B.A. received June, 1972, Major: political science.  
Admitted to practice before the courts in Massachusetts; U.S. District Court, District of Massachusetts; U.S. Court of Appeals, First Circuit; U.S. Supreme Court.

EMPLOYMENT HISTORY:

April, 1985 - Present, Assistant Director of Real Estate, Massachusetts Turnpike Authority. Responsible for the supervision of twenty-four employees in the Patron Services Division, a budget of \$500,000, the negotiation of leases and licenses and the management of the Authority's real estate holdings.

1983 - 1985, Assistant Secretary and General Counsel, Commonwealth of Massachusetts Executive Office for Administration and Finance. Provided legal analysis and opinions to the Secretary of Administration and Finance and the staff of the Executive Office. Supervised three departments within the Secretariat, and interacted with the Governor's staff, legislature and other Secretariats within the Executive Branch.

1979 - 1983, Associate and Assistant Counsel, Prudential Insurance Company of America, Northeastern Home Office. Provided legal analysis and opinions to the various departments in the company. Supervised outside counsels throughout the Northeastern United States relative to claim litigation cases and provided labor relations expertise to corporate legal counsels. Principally responsible for legal opinions for the Group Insurance Department and the Agency Administration Division's Defalcation Unit.

1975 - 1979, Attorney, National Labor Relations Board, Boston Regional Office. Conducted representation hearings and elections, investigated unfair labor practice cases, drafted representation case decisions, and prepared and litigated unfair labor practice cases.







1968 - 1975, Legal Internships.

- Bedford Stuyvesant Community Legal Services, NY
- Department of Welfare, Appeals Division, Boston, MA
- Massachusetts Attorney General's Office, Boston, MA
- U.S. Attorney's Office, Boston, MA
- Goodwin, Proctor, and Hoar, Boston, MA

AFFILIATIONS:

President, Boston Branch NAACP, 1980-1983.  
First Vice President, USO Council of New England, Inc.  
President, Executive Committee of Northeastern  
University School of Law Alumni Association  
Member, Corporation of Northeastern University  
Member, National Council of Northeastern University  
Member, Massachusetts Black Lawyers Association  
Member, Omega Psi Phi Fraternity

AWARDS AND HONORS:

"Dean's List," 1968-1969;  
"Outstanding Young Man of America,"  
"Outstanding Community Leader", George Washington Carver Grand  
Lodge #99;  
Alumnus of the Year, Northeastern University School of Law  
Alumni Association;  
"Interfaith Award", Anti-Defamation League of B'NAI B'RITH,  
"Distinguished Service Award", Boston Chapter, National Business  
League;  
"Outstanding Community Service Award", Boston Federal Executive  
Board, Minority Opportunity Committee;  
"Outstanding Alumnus for Public Service," Northeastern  
University.

References submitted upon request.







## in the news

Joseph D. Feaster Jr.

Joseph D. Feaster Jr. of Elmore Street in Roxbury has been elected president of the Northeastern University School of Law Alumni Association.

Feaster, 37, the assistant real estate director for the Massachusetts Turnpike Authority, received a juris doctor from the School of Law in 1975 and a bachelor's degree in political science from the College of Liberal Arts in 1972.

He plans to increase the association's membership as well as the participation of alumni on the local and regional level.

Feaster, a member of the Northeastern University Corporation, was also recently appointed to the board of overseers.

Prior to joining the MTA in April 1985, Feaster served for two years as assistant secretary and general counsel for the state Executive Office of Administration and Finance. He was also associate counsel for the Prudential Insurance Co. from 1979 to 1983 and an attorney with the National Labor Relations Board for the Boston region from 1975 to 1979.

Feaster is an active member of the Massachusetts Black Lawyers Association and is on the steering committee of the Lawyers' Committee for Civil Rights Under Law.

A former president of the Boston branch of the NAACP, he is also a



member of the board of directors of the Metropolitan Area Planning Commission and on the board of

the Franklin Park Coalition.

Feaster has two children, Aalana, 9, and Joseph III, 4.

Bay State Banner - September 10, 1987







Joseph D. Feaster of Roxbury, assistant secretary and general counsel for the Commonwealth of Massachusetts Executive Office for Administration and Finance, was chosen as one of six outstanding alumni by Northeastern University. He was honored for his achievements and contributions in public service.

Feaster earned his undergraduate degree in political science from Northeastern in 1972 and his Juris Doctor degree from Northeastern in 1975.

Formerly chairman of the University's chapter of the Black American Law School Association, Feaster is a member of the Northeastern University Corporation and secretary of the executive committee of Northeastern's School of Law Alumni Association. In 1981, the law school cited him as its alumnus of the year.

Feaster has long been a leader in community and civic affairs. From 1980 to 1983, he was president of the Boston branch of the NAACP. He is a trustee of the Massachusetts Cultural Alliance, a member of the steering committee of the Lawyer's Committee for Civil Rights Under Law, and a member of the Massachusetts Black Lawyers' Association.

In 1979, Feaster was recognized by U.S. Jaycees as an "Outstanding Young Man of America." The George Washington Carver Grand Lodge



No. 99 and the Minority Management Association of New England Telephone Company cited him as

"Outstanding Community Leader" in 1980 and 1982, respectively.

BRISTOL GAZETTE, NOVEMBER 17, 1983







# Duke taps Feaster as A&F lawyer

Jim Jordan

The **Banner** has learned that attorney Joseph D. Feaster Jr., recently retired president of the Boston branch NAACP, has been selected as general counsel to the Dukakis Administration's Secretary of Administration and Finance.

The appointment will be announced officially at a ceremony this week.

As counsel, Feaster will have direct supervision of the Massachusetts Commission Against Discrimination (MCAD) and the state office of affirmative action.

Administration and Finance Secretary Frank T. Keefe said "Joe is a splendid guy. He's tremendously well-qualified." Keefe said A&F covers an "incredibly broad spectrum of activity," and "Joe will be serving as my chief legal advisor in all those areas."

Feaster, 32, is presently the associate counsel to the Northeast Home Office of the Prudential Insurance Co. in Boston. He was president of the Boston branch from 1979 to 1982. He finished the term of Thomas I

continued to page 21

DAY STATE BANNER, JANUARY 13, 1993

Feaster

ed from page 1

who left the branch to the NAACP's national office, and was elected to two terms in the office.

Feaster, a 1975 graduate of Northeastern University School of Law, will serve as lawyer to the Governor, a position he has previously held. He is considered the most powerful of all cabinet positions.

New York City native got his practical legal experience as a law intern with the Bedford-Stuyvesant Community Legal Corporation in New York in 1974. In 1974, he coordinated the work of a group of Northeastern law students on the

Boston Public Schools desegregation case.

Last week, Feaster said the Dukakis Administration made "a great offer" to him and that he was excited about working at the cabinet level.

In an interview, he cited his "ability to establish working relationships throughout the city" as

the hallmark of his term as chief executive of the influential organization.

In a Boston City Council resolution saluting Feaster in December, he was lauded as a "distinguished attorney, community leader, advocate and activist."

Last fall, Feaster served on the 14-member advisory committee that selected finalists for the post of executive director of the

Massachusetts Port Authority (Massport). Former Governor Edward J. King later ignored the committee's candidates and appointed former state Representative Louis Nickinello to the position.

Feaster lives in Roxbury with his wife, Carmencita K. Feaster, a Digital Corporation credit representative, and daughter Aalana Radiah. They are expecting another child in July.







CHARLES T. GRIGSBY  
29 Worcester Street  
Boston, MA 02118

EDUCATION:

1978	Boston University Graduate Courses in Business & Finance
1975	Harvard Business School NASBIC Venture Capital Seminar
1967	Northeastern University Graduate Courses in Business, Finance & Accounting
1957-1961	Harvard College, BA
1953-1957	Phillips Academy, Andover

EXPERIENCE:

1982 - Present	MASSACHUSETTS COMMUNITY DEVELOPMENT FINANCE CORPORATION President. Management of State-financed economic development corporation.
1974-1982	MASSACHUSETTS VENTURE CAPITAL CORPORATION President. Managed a minority enterprise small business investment company.
1972-1974	LEE-GRIGSBY ASSOCIATES, INC. Partner. Provided management consulting services for small business development. Served as interim, operating management for small companies.
1970-1972	THE BOSTON URBAN FOUNDATION Executive Director. Management of small business portfolio and fundraising to capitalize a new venture capital company.
1965-1970	FIRST NATIONAL BANK OF BOSTON International Loan Officer. Lending to national and international companies. Calling responsibilities in New England, Western Europe and England.
1963-1965	AGENCY FOR INTERNATIONAL DEVELOPMENT U.S. Department of State, Special Assistant to the Administrator.







MILITARY SERVICE:

1961-1963                    UNITED STATES NAVAL RESERVE  
Lieutenant J.C. Communications Division  
Officer on board USS Ticonderoga (CVA-14)

BOARDS & DIRECTORSHIPS:

1984-Present                Member, Steering Committee, Chamber of  
Commerce, Boston 2000

1983-Present                Chair, Board of Directors, Urban League  
of Eastern Massachusetts

1983-Present                Member, Board of Directors, Massachusetts  
Venture Capital Corporation

1983-Present                Member, Board of Directors, ICA Revolving  
Loan Fund

1981-1986                    Advisory Committee, Newworld Bank for  
Savings

1982-1983                    Founding Director, Boston Bank of  
Commerce, and Chairman, Loan Policy and  
Review Committee

1977-1980                    Chairman, Massachusetts State Board of  
Education

1973-1982                    Member, Massachusetts State Board of  
Education

1974-1976                    President, United Neighborhood Centers of  
America, New York

1973-1974                    Member, Massachusetts Governor's  
Commission on School Redistricting and  
Collaboration

1970-1974                    Board Member, Circle, Inc., Community  
Development Corp.

1970-1971                    Member, Governor's Task Force on  
Transportation

1970-1972                    President, Urban League of Boston

PERSONAL:

License: Private Pilot  
Hobbies: Tennis, jogging, flying  
Divorced  
Date of Birth: April 26, 1939







BANKER & TRADESMAN  
BOSTON, MA  
02108

Thrift  
Fund

AUG 13 1986

NEW ENGLAND NEWSCLIP AGENCY, INC.

## Fund Provides Loan To Medical Supplier

The Thrift Institutions Fund for Economic Development recently approved a \$200,000 loan to Cunningham Woodland, Inc. in Whitman.

The company, which was formed six years ago by George Woodland and Bruce Cunningham, produces pre-packaged, sterile, medical dressing kits. The loan proceeds will be used to acquire sterilization equipment for kit contents. Sterilization is currently subcontracted to an out-of-state firm.

According to Charles Grigsby, president of the Community Development Corporation (CDFC), one of four agencies designated to act as agents for the Thrift Fund, the loan was recommended because of the number of new jobs the loan would generate. Mr. Grigsby explained that the new equipment will allow higher production levels and result in a 25 percent increase in the company's labor force to a total of 65 employees.

The Thrift Institutions Fund for Economic Development is a \$100 million economic development lending pool funded by the state's 275 savings banks, federal savings and loan association, and co-operative banks. Since its inception in late 1985, the Thrift Fund has approved nearly \$29 million in loans and has disbursed more than \$5 million to date. ☐







BAY STATE BANNER  
DORCHESTER, MA  
W. 11,000

*CDFC files*

JUN 18 1987

NEW ENGLAND NEWSCLIP AGENCY, INC.

#### Infill Housing Loan

The Massachusetts Community Development Finance Corporation is loaning \$200,000 to a corporation renovating 84 vacant Infill housing units in Roxbury, North Dorchester and the South End.

The Infill Collaborative, a joint effort of four local community development corporations, is creating low-priced condominiums from the long-vacant Infill buildings.

The Codman Square Housing Development Corporation, Nuestra Comunidad Development Corporation, Quincy-Geneva CDC and the Roxbury-North Dorchester Neighborhood Revitalization Corporation are the four participating non-profit agencies.

CDFC President Charles T. Grigsby commented, "This project brings together four community development corporations with a wealth of housing development experience behind them."

"CDFC's participation helps to maintain the affordability goals for low and moderate-income families. The collaborative demonstrates the important role of non-profit community housing developers in the neighborhood revitalization."

FITCHBURG LEOMINSTER  
SENTINEL & ENTERPRISE  
FITCHBURG, MA  
D. 23,698

FEB 19 1987

NEW ENGLAND NEWSCLIP AGENCY, INC.

#### Bonding authority

BOSTON (AP) — A legislative panel has approved bills providing \$512 million in new bonding authority to help finance local small business starts and construction of multi-family homes.

The Housing and Urban Development Committee on Wednesday passed legislation by Rep. Sandra Graham, D-Cambridge, that would provide the Massachusetts Development Finance Corp. with \$12 million in new bonding authority.

MDFC President Charles Grigsby said \$5 million will provide financial backing for minority- and women-owned construction contractors.

The remainder of the new bonding authority would go to providing financial support to local community development corporations.

Grigsby said MDFC helps about 60 community development corporations across the state provide capital to new businesses and fund low-income housing projects.

## CDFC Lends Funds For Co-op Housing

Massachusetts Community Development Finance Corporation (CDFC) has made a \$200,000 commitment to support the development of a 140-unit cooperative housing project in Lawrence for low- and moderate-income families. The loan was proposed to CDFC by Heritage Common Community Development, Inc. (HCCD) in Lawrence.

Additional financing will come from MHFA bonds with SHARP subsidy, a federal Housing Development Action Grant, and equity syndication. The syndication is expected to be offered to investors as part of an equity pool with Paine Webber. In addition, a CDAG will pay for infrastructure at the site.

Charles Grigsby, CDFC president, noted, "Redevelopment of this site will generate new tax revenue to the city, provide badly needed housing and improve a vacant and blighted area." □







PAMELA GILLMAN MCDERMOTT  
201 Milton Street  
Dorchester, MA 02124

EDUCATION:

1975-1976 Suffolk University  
Graduate School, Masters of Public  
Administration (courses)

1969-1973 University of Vermont  
B.S., Education

EXPERIENCE:

1985 - Present NORTHEAST AFFILIATES, INC.  
Executive Vice President. Provides real  
estate services, including investment,  
development and consulting.

1981-Present NORTHEAST MANAGEMENT & MARKETING  
COMPANY, INC.  
Founder and President. Responsible for  
all operations of Northeast Management &  
Marketing Company. Northeast specializes  
in government/community relations, press,  
marketing, and special events management.

1981 CANDIDATE FOR BOSTON CITY COUNCIL  
Ran for citywide elective office, in non-  
partisan, multi-candidate field. Won  
Primary Election, and lost in General  
Election.

1980-1981 CITY OF BOSTON  
OFFICE OF MARKETING AND DEVELOPMENT  
Project Director. Developed economic  
development marketing strategy, to  
encourage business relocation and  
expansion in the City.

1979-1980 D.H. SAWYER & ASSOCIATES  
Director, Boston Office. Created,  
developed and marketed first satellite  
office for N.Y. based political and  
corporate communications firm.







1977-1979

COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF THE LIEUTENANT GOVERNOR  
Governor's Representative to the New  
England Governor's Conference.  
Recommended economic development,  
transportation and energy policies for  
New England, totalling \$7 million in  
federal aid.

Coordinator, Northeast Alliance of  
Business, Labor & Government. Introduced  
and helped garner support from nine  
Northeastern Governors for "Alliance", to  
address economic problems of Northeast.

Coordinator for Coalition of Northeastern  
Governors.

1977

UNIVERSITY OF MASSACHUSETTS  
Consultant. Developed educational  
training program for municipal officials.  
Helped secure \$100,000 for program.

1974-1977

NEW ENGLAND GOVERNOR'S CONFERENCE  
Special Assistant to Federal Co-Chairman.  
Represented President's policy on all  
contracts, grants, and financial  
allocations, and coordinated Federal  
activities.

BOARDS AND DIRECTORSHIPS/MEMBERSHIPS:

Alternate, Boston Landmarks Commission

Committee, Boston Center for the Arts  
75th Anniversary

Board of Directors, Boston Cable Access  
Foundation

Board of Advisors, International Cultural  
Exchange (ICE)

Reception Committee, The Laboure Center,  
Inc.

Board of Directors, "Women's Enterprises"







Board of Directors, Big Sister  
Association of Greater Boston

Chairman, Public Relations  
Committee, 1986/1987

Co-Chairman, Celebrities  
Ball, 1984/1985

Member, Massachusetts Women's Business  
Development Council

Member, Greater Boston Chamber of  
Commerce Executive's Club

AWARDS:

1987	Selected for "Who's Who in Emerging Leaders "
1986	Selected for "Who's Who in American Women"

PROFESSIONAL ACCREDITATIONS:

Registered Real Estate Broker







# NORTHEAST MANAGEMENT & MARKETING COMPANY NEWSLETTER

1986



issues management and strategic marketing expertise. A full complement of marketing communications. An insider's knowledge of New England's dynamic and highly competitive marketplace and a proven ability to communicate effectively with region's policy-makers, media, and business communities.

These are the resources you'll find at Northeast Management & Marketing Company—a unique combination of creative skills and business experience has made the firm a proponent of New England's leading businesses, professionals, and non-profit organizations. Since Pamela McDermott and Gregory McKett founded Northeast in 1981, the firm has successfully advised more than 50 clients in such diverse fields as real estate, education, health care, law, finance and accounting, government, journalism, and numerous consulting specialties. Alert to the strong and often volatile interplay of New England's business, political, and social

communities, Northeast utilizes a broad spectrum of contacts to achieve wide ranging marketing communications objectives for its clients.

Clients in all fields and organizational stages look to the firm for timely intervention and management of crisis situations, sensitive public and specific audience issues, business seminars, charitable fundraisers, and promotional events. Young, growing businesses and organizations new to the region rely on Northeast to structure their introduction to the New England marketplace. The firm also develops integrated communications programs for clients such as law firms, who traditionally have not required marketing expertise but now find themselves in competitive markets for the first time.

The increasingly national scope of the firm's marketing activities and the explosive growth in New England's real estate market has motivated Northeast to expand its capabilities even further.

Northeast has broadened its advertising capabilities through an affiliation with Bogardus Lowell, a full-service advertising agency. A recent affiliation with the public relations firm of Conover and Company augments Northeast's extensive national business and government resources with a network of national media contacts. Northeast has also enhanced its expertise in real estate development issues through an affiliation with Richard Taylor, a well-known Boston neighborhood developer. Through this affiliation, Northeast interprets Boston's new linkage requirements and assists developers in fulfilling them.

The newly expanded Northeast Management & Marketing Company is stronger than ever—well positioned to meet the challenges a growing New England will surely bring. The critical question is: how can Northeast help you achieve your goals?



**N**ortheast provides a full complement of communications services. These include: strategic market research and planning, publicity, issues and special event management, press, government, community and business relations, speech-writing, fund-raising, advertising, and the development and production of marketing support materials. The firm specializes in tailoring these communications tools to the New England marketplace, and has successfully applied its broad-based experience in a number of business areas. The following is a representative sampling of Northeast's work for clients in some of the region's major markets.

## BUSINESS

**T**he common denominator in Northeast's corporate communications work is the firm's grasp of the New England marketplace and the most effective means for communicating with its government, media, and business policy-makers. National and regional business clients depend on Northeast to interpret and evaluate the marketplace and to achieve their communications objectives in light of the firm's strong regional expertise.

In August of 1984, *Bruce Church, Inc.* engaged Northeast to help counteract the negative effects of a secondary boycott resulting from a campaign conducted by the United Farm Workers (UFW), the recognized bargaining agent for the employees of this lettuce grower. The company believed that it had been locked out of the New England market, because many food retailers felt pressured to capitulate to UFW demands to boycott *Bruce Church, Inc.* rather than incur the long-term damage to their reputation that was the expressed aim of the UFW campaign.

Northeast's involvement was twofold. First, Northeast helped organize a fact-finding trip to the company's headquarters in Salinas, California. A number of New England opinion-leaders participated in an educational tour of the *Bruce Church* operation to obtain an objective assessment of the situation. Following the August tour, Northeast was again engaged in October of 1984 to assist with a public education campaign here in New England. The New England campaign was a re-

sounding success, as evidenced by the presence today of *Bruce Church* produce on supermarket shelves throughout the region.

Prior to its merger with Connecticut Bank & Trust, *Bank of New England* engaged Northeast to prepare an analysis of current political and business activities throughout the region. The bank used Northeast's report to measure the business and political climate at city, state, and regional levels to ensure thorough consideration of all opportunities and potential problems associated with current operations and the impending business venture with CBT.

Recently, Northeast was selected by the *Fire Safety Committee* to develop a full-scale, statewide press effort to support a legislative bill that would require all buildings over 70 feet tall to install automatic sprinkler systems. Northeast worked with legislative lobbyists and the local print and electronic media to produce much-publicized events surrounding fire safety demonstrations and the first legislative hearing on the bill. Over the next thirty days, Northeast continued to garner editorial and talk show coverage of the issue until a successful legislative decision was reached.

## NON-PROFIT ORGANIZATIONS AND COMMUNITY SERVICE

**U**ltimately, a region is judged by the quality of life it provides for all residents. Northeast believes that by supporting the efforts of non-profit organizations committed to improving the standard of living for all New Englanders, the business, political, and social communities advance their own commitments to the region's long-term health. In keeping with this spirit, Northeast regularly assists charitable organizations on a pro-bono basis.

In 1982, financial strains threatened to restrict the outreach of South Boston's *Laboure Center*, which has been providing clinical, educational, and health services to families in the community since 1907. Northeast worked with State Senate President Bill Bulger and the Laboure Reception Committee to develop a new forum for contributors, and assisted in fundraising efforts at a reception at Anthony's Pier Four. Northeast's publicity services helped establish a successful precedent for this annual event.

Northeast is currently undertaking a press campaign for International Cultural Exchange, Inc. (ICE), a unique organization founded by two college students to promote cooperation and cultural exchange between the United States and the USSR. ICE's first major undertaking is "The Hockey Project," a two week summer hockey camp at an American university for Soviet and American hockey players. Northeast is maintaining press coverage for the organization while preparations for "The Hockey Project" are finalized.

When Northeast President Pam McDermott was asked to serve as Chair of the Big Sister Association Annual Celebrities' Balls in 1984 and 1985, Northeast again stepped in to play a major role in the fundraising, organizational, and publicity efforts involved in producing these successful events. Income from the second annual ball was double that of the first, giving the Big Sister Association a new precedent to uphold.

## REAL ESTATE

**N**ew England's real estate market is exploding. Real estate activity is strong in all areas of the region and is directly impacting all sectors of the economy. In Boston, this growth has stimulated government involvement in the development process. Requirements of linkage and parcel linkage policies have made development more complicated than ever before. In this complex and competitive environment, identifying and informing the proper audiences requires in-depth knowledge and a strategic approach.

Northeast is currently providing government and community relations counsel to the *A.W. Perry Company* and *Jaymont Properties, Inc.*, joint venturers in a multimillion dollar, 23-story office- and -retail development/renovation project in Boston's South Station area. This complex project affects several communities and interest groups, including Chinatown, Downtown Crossing, the Theatre District, and developers of nearby projects. Northeast is working closely with representatives of these constituencies and with elected officials and government regulatory agency pri-



# REAL ESTATE SERVICES

Nowhere is the importance of effective communications more evident than in New England's exploding real estate market. Real estate activity is strong throughout the region, directly impacting all sectors of the economy and its continued growth. Project approval and completion involves a wide range of business, government, and community interests.

With so much activity affecting so many people, targeted marketing and communications have become critical to the success of any real estate venture. Identifying and informing the proper audiences requires in-depth knowledge and a strategic approach, which can be devised only by a communications firm that really knows the real estate marketplace and its key decision-makers. Northeast Management & Marketing Company is such a firm. Since its founding, Northeast has worked with more than a dozen national and local developers and real estate-related service companies. The firm has advised clients involved in real estate investments and land purchases as well as commercial, industrial, and residential development. These clients rely on Northeast's proven experience, expertise, and wide-ranging contacts in New England's business, media, and government communities.

The firm advises its clients throughout the development process, from obtaining project designation and approvals to marketing completed projects to prospective tenants. Northeast offers a full complement of marketing communications services. These include government and community relations counsel, press strategies, public relations programs, assistance in developing linkage proposals and other contributions to the city or state, development and production of marketing support materials, and management of special events such as educational seminars, groundbreakings, "topping out" ceremonies, and openings.



## REAL ESTATE DEVELOPMENT

The unprecedented growth in Boston real estate development has generated two new urban planning/development concepts: linkage and parcel-to-parcel linkage. For the first time, developers executing large-scale projects in downtown Boston must also insure the creation of low- and moderate-income residential or commercial units in Boston's neighborhoods. Secondly, the city is beginning to "parcel" a neighborhood site with a downtown site. The development of both sites must be implemented simultaneously. Mayor Raymond Flynn and Boston Redevelopment Authority Director Stephen Coyle have recently articulated rules and regulations governing the implementation of these concepts.

Both of the new concepts are complex propositions. Successful linkage proposals depend on knowledge of Boston's government and community

decision-makers as well as the location of appropriate sites for linkage development. Northeast can help.

Recently, the firm formed Northeast Affiliates in conjunction with Richard Taylor, an experienced local developer. Northeast Affiliates counsels real estate developers on linkage options, assists in the preparation of linkage proposals, and can act as a developer on linkage projects. In essence, the firm interprets linkage requirements and aids developers in fulfilling them.

## GOVERNMENT/COMMUNITY RELATIONS

Government and community relations are an integral component of the pre-designation or approval stage of the development process. Targeted market research and the effective communication of project benefits to key decision-makers can aid approvals and circumvent obstacles to project completion.



Northeast advises clients in all aspects of the pre-designation process. The firm provides counsel on the political implications of a project, its environmental impact, and its effects on the surrounding community. Northeast assists in relations with project neighbors and special interest groups. The firm conducts market surveys and analyses to define project objectives and effects, and assists in the development of presentations to elected officials, government decision-makers, and regulatory agencies. In addition, Northeast helps developers to design linkage proposals and agendas for contributions to the city or state.

Northeast is currently providing government and community relations counsel to the *A.W. Perry Company* and *Jaymont Properties, Inc.*, joint venturers in a multimillion dollar, 23-story office-and-retail development/renovation project in Boston's South Station area. This complex project affects several communities and interest groups including Chinatown, Downtown Crossing, the Theatre District, and developers of nearby projects. Northeast is working closely with representatives of these constituencies and with elected officials and government regulatory agencies to ensure smooth and successful completion of the project. The firm is also counseling the developers on linkage options, and fulfilling all linkage requirements.

This same comprehensive knowledge of real estate marketing led the *Dallas Market Center Company*, a *Trammell Crow* company, to engage Northeast to assist with their entry into the Boston marketplace. Challenged by an extremely competitive environment and seemingly impossible deadlines for their Boston Design Center project, the *Dallas Market Center Company* realized they needed local expertise. Northeast advised the company as to the implications of the project, and educated company principals on some of the potential problem areas and political ramifications of their decision and actions. The Boston Design Center was completed on schedule.

#### PRESS STRATEGIES

**N**ortheast Management & Marketing Company has developed and implemented comprehensive

press strategies for numerous real estate clients. Northeast can either develop complete press and public relations strategies to aid in the approval process and augment the marketing of completed projects to the community and to prospective tenants, or undertake specific press responsibilities for one segment of a project's marketing effort. In either instance, Northeast's services would include the writing and placement of articles and releases to announce project progress and ongoing media relations to generate public and special interest support.

Recently, Northeast was engaged by *Fairchild Communications Services/Boston* to develop a comprehensive press strategy to strengthen this company's presence in the Boston real estate market. Together with *NYNEX*, *Fairchild* develops "smart" buildings, a revolutionary construction concept whereby voice, video, and data communications networks are built into a building's original structure. Northeast has gained substantial press coverage for two *Fairchild* projects to date: One Memorial Drive and the Carter's Complex, both in Cambridge.

*The Congress Group* was also attracted to Northeast because of the firm's extensive regional media contacts and in-depth understanding of the Boston real estate market. Northeast implemented a full-scale press effort to publicize the opening of Building 149 in the Charlestown Navy Yard. Northeast developed and placed feature articles on the development in the *Boston Business Journal*, the *Boston Ledger*, the *Charlestown Patriot*, the *Real Estate Journal*, and the *Boston Globe*.

#### MARKETING MATERIALS

**N**ortheast has full creative development and production capabilities for all marketing materials. The firm works with some of the finest copywriters, designers, photographers, and audio-visual production professionals in the area. Projects include brochures, press kits, articles, newsletters, and audio-visual presentations. Careful attention is paid to budget considerations and project objectives to assure the most cost effective solutions possible.

Northeast's proven ability to orchestrate the flow of information among diverse real estate audiences convinced the *City of Lynn, Massachusetts* to select the firm to secure additional exposure

for its rehabilitation and new construction projects. The city also engaged Northeast to produce an Annual Report for the Lynn Office of Economic Development.

Northeast's comprehensive knowledge of real estate marketing also led *Torto-Wheaton & Associates* to assign the firm responsibility for the production of the company's first informational brochure. This Boston-based consulting firm forecasts commercial real estate trends for more than 40 metropolitan markets across the country.

#### SPECIAL EVENTS AND SEMINARS

**T**raditionally, real estate marketing strategies have included numerous special events such as groundbreakings, "topping off" ceremonies, press luncheons, and openings. And while Northeast views these occasions as valuable opportunities to maintain public visibility, the firm can also assist with more substantive evening and educational seminars directed toward specific interest groups or potential tenants.

Recently, when the real estate division of *Essexbank* sought to increase lending business, the bank asked Northeast for advice. Northeast recommended a seminar for the division's target audiences: financial planners, real estate attorneys, developers, architects, construction firms, and other businesses involved in real estate projects. Northeast arranged for three experienced real estate developers to address the group. *Essexbank* gained valuable visibility and credibility with many potential clients while providing an informative, much needed service to the real estate community.

In May 1984, *The Gilbane Building Company* engaged Northeast to assist with their entry into the Boston market. The company had two major accomplishments to announce—the construction of Marketplace Center and the completion of "Exchange Place." Northeast gathered major opinion leaders from the city's government, media, business, and real estate communities for a cocktail reception at Anthony's Pier 4 restaurant. The reception cast *Gilbane* in a favorable light for many of the city's key decision-makers, a valuable investment in the company's future.



als to ensure smooth and successful completion of the project. The firm is also counselling the developers regarding linkage options, and in the fulfillment of all linkage requirements.

This same comprehensive knowledge of real estate marketing led the *Dallas Market Center Company*, a Trammell Crow company, to Northeast when they needed assistance with their entry into the Boston marketplace. Challenged by an extremely competitive environment and seemingly impossible deadlines for their Boston Design Center project, the *Dallas Market Center Company* realized they would benefit from local expertise. Northeast advised the company as to the implications of the project, and educated company principals on some of the potential problem areas and political ramifications of their decisions and actions. The Boston Design Center was completed on schedule and opened on April 30, 1986.

Recently, when the real estate division of *Essexbank* sought to increase its lending business, the bank asked Northeast for advice. Northeast recommended a seminar for the division's target audiences: financial planners, real estate attorneys, developers, architects, construction firms, and other businesses involved in real estate projects. Northeast arranged for three experienced real estate developers to address the group. *Essexbank* gained valuable visibility and credibility with many potential clients while providing a much needed service to the real estate community.

LV

In recent years, increased competition has resulted in the introduction of marketing to the legal profession. Where will this change be more thoroughly tested than in New England, home of so many established and growing firms. Successful marketing strategies will be those that can identify and educate the public without compromising the high professional standards of the legal practice being presented.

*Widett, Slater & Goldman*, a large progressive firm of more than 70 attorneys, has recently designated Northeast as their first public relations representative. Northeast has developed and is currently implementing an

overall public relations strategy that includes: extensive introduction of the firm to the press, trade associations, and industry groups, development of a firm brochure targeted toward existing and prospective clients, a complete press strategy including placement of articles by *WS & G* attorneys in appropriate publications, and the development of a Speaker's Bureau and *WS & G* Resource Guide to promote the use of *WS & G* as a legal resource for the media and interested business organizations.

In 1982, Northeast had also been assigned full press and publicity responsibilities for the *New England Law Partnership*, one of the nation's first regional law partnerships. The initial phase of this strategy included an introductory publicity brochure distributed in Washington, D.C. and three New England states, and a media campaign to gain exposure, through which Northeast placed feature articles about the partnership in the *Wall Street Journal*, the *Boston Globe*, *New England Business*, and the *Boston Business Journal*.

## EDUCATION

New England, and Boston in particular, has a long tradition as the capital of American education. In recent years, a decline in the number of college-age students has placed pressure on institutions of higher learning to develop innovative marketing methods to attract suitable enrollment. In Boston, fiscal attention has been drawn to one practical aspect of the city's commitment to education—that fully 60 percent of municipal property is tax-exempt, including all schools, colleges, and universities. Given this highly competitive environment and recent questions about the viability of Boston's long standing education tradition, strong marketing and communications strategies have become essential.

When *Northeastern University* administrators decided to respond to the public debate over the equity of their tax-exempt status, they hired Northeast to manage the public and community relations campaign. Northeast developed a brochure and slide presentation to highlight the counter-balancing benefits that the University provides to the city and its residents. Liaison work with community and government officials culminated in the successful cam-

paign "A Part of Boston, and Proud of it." Northeast has continued to work with *Northeastern University* on an ongoing basis. During the winter of 1985, Northeast assisted in the distribution of a Public Service Announcement to publicize the *National Committee on Cooperative Education*, which is housed at *Northeastern*.

## ENTERTAINMENT AND TOURISM

Nowhere is the whim of the consumer more evident than in the entertainment realm. Knowing which audiences to reach and accurately timing advertising and promotional efforts demands a knowledge of the region and a constantly renewed sense of what residents and tourists expect from New England.

When Cambridge Seven & Associates chose Northeast to manage "Where's Boston?" in 1981, a complete media campaign was launched to establish a new image for the theatre. Northeast expanded the performance schedule with group-sales programs and a two-fold appeal to the daily flow of pedestrian traffic: a roving mime troupe attracted interested spectators to the show seven days a week in the Faneuil Hall locale and a new advertisement display was mounted in the Quincy Market area.

Northeast's extensive tourism and entertainment experience lead the tall ship *Spirit of Massachusetts* to select the firm to develop and implement a full marketing strategy for its 1985 East Coast tour. Initially, Northeast organized a welcoming event for potential charter users of the ship, and handled scheduling to maximize use of the ship while in Massachusetts. Northeast also developed and distributed a comprehensive sales kit, which was mailed to more than 500 businesses across the country.

In preparation for a full-scale tourism campaign in 1987, the *City of Lynn* recently engaged Northeast to develop the press strategy for a kick-off celebration in September of 1986. The entire city will take part in an all-day carnival of games, demonstrations, events, and open house tours of various Lynn industries.



## FINANCE AND ACCOUNTING

**N**ortheast recognizes that communicating an identity to the Boston business marketplace involves more than a promotional campaign and name recognition. It requires innovative thinking, and marketing solutions that reflect an understanding of the critical issues affecting both the client and its target audience.



Earlier this year, Bank of Boston sought a forum for addressing Massachusetts business customers about the region's economic prospects. The bank hired Northeast to manage an educational seminar entitled "*The Massachusetts Business Boom: Can Today's Prosperity Continue?*" Northeast managed all of the arrangements and invited Stephen Coyle of the Boston Redevelopment Authority; Massachusetts Secretary of Transportation Fred Salvucci; John Crosier, Director of the Massachusetts Business Roundtable; and Wayne Ayers, Senior Financial Economist at the Bank of Boston, to address the group. By sponsoring this informative event, *Bank of Boston* gained press coverage as well as exposure and credibility with business clients.

When *KMG Main Hurdman*, one of the world's largest accounting and management consulting firms, asked Northeast to address its Boston client list and generate higher visibility, the firm wanted to enhance its competitive position within the city. Northeast moved internally first, reorganizing the firm's overall communications strategy. Well-attended annual receptions give local business executives an opportunity to meet *Main Hurdman* executives in an informal setting. Already, the firm can point to new clients as a result of these public relations efforts.

## CLIENT LIST

Bank of New England  
Bank of Boston  
The Bay Group  
Big Sister Association of Greater Boston  
The Bostonian Group  
Boston Walkabouts  
Boston Safe Deposit and Trust Company  
Bruce Church, Inc.

City of Lynn  
City of Milwaukee  
Commonwealth Charitable Fund  
The Congress Group, Inc.  
Corporate Cuisine, Inc.  
Cramer Video Incorporated

Dallas Market Center Company

Hon. Edward J. McCormack, Esquire  
Energy Partners Incorporated  
Essexbank

Fairchild Communications Services/  
Boston

Fire Safety Committee

First New England Securities Corporation

Gilbane Building Company

Hawley Investors

International Cultural Exchange (ICE)  
International Student Association of New England

Kravco, Inc.  
KMG Main Hurdman

Laboure Center

Massachusetts Industrial Development Fund

New England Historic Seaport/  
"Spirit of Massachusetts"  
New England Law Partnership  
Northeastern University

Perry/Jaymont Venture  
Pope John XXIII National Seminary  
Positions, Incorporated  
Prudential Insurance Company of America

Rachwal Industries, Inc.  
Reiser & Rosenberg  
Rollert & Sullivan

Seajam, Inc.  
Stadium Management Corporation  
Stadium Realty Trust  
Torto, Wheaton & Associates  
Trammell Crow Company

"Where's Boston?", Inc.  
Widett, Slater & Goldman

## SERVICES

- Brochures
- Annual and quarterly reports
- Development of articles, speeches, presentations and news releases
- Press conferences and publicity
- Meetings, seminars and conferences
- Fundraising
- Direct Mail
- Audio/visual presentations
- Market Research
- Special events and promotions
- Advertising
- Government and community relations
- Development of strategic marketing plans

For more information, please call

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Gregory P. Plunkett  
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## GOVERNMENT & COMMUNITY RELATIONS, PUBLIC EDUCATION

When the One Twenty Five High Street Limited Partnership (The Prospect Company [the real estate arm of The Traveler's], Spaulding & Slye, and New England Telephone), needed assistance with their multi-million dollar downtown office and retail development, they called upon Northeast Management & Marketing Company to design and implement a wide-reaching and comprehensive public and government/community relations plan.

Northeast's President, Pamela G. McDermott, assumed full responsibility as Project Spokesperson, and as liaison between the many diverse constituencies involved, including elected officials, community, civic, and historic groups, abutters and government agencies. In addition, Northeast developed an informational audio/visual presentation and brochure to educate the public and concerned groups; helped to develop a linkage package for the project; and assisted with the development of a progressive traffic program.

Northeast also provided government and community relations counsel to the A.W. Perry Co. and Jaymont Properties, joint venturers in a multi-million dollar 23-story office and retail development/ renovation project at 125 Summer Street. This project affected several communities and interest groups, and Northeast worked closely with representatives of these constituencies, and with elected officials and government agencies to ensure smooth and successful completion of the project. Northeast also assisted in the development of options to fulfill linkage requirements, which resulted in the City's first housing creation project.

Other related real estate experience includes Northeast's work with The Congress Group, a Boston area developer who needed a comprehensive marketing and press strategy to reach potential lessees, and the general public. The firm also looked to Northeast for government relations counsel. Over the course of the relationship, Northeast has publicized Congress Group building openings by placing feature stories in such publications as the Boston Globe, the Boston Herald, New England Business and the Boston Business Journal.

The Trammell Crow Company has also engaged Northeast to provide government relations counsel for a proposed suburban commercial/residential development that has encountered community difficulty. At present, the project is embarking on a massive government/community outreach program which has been designed to take the project through final town approvals.







Northeast also serves as counsel to the Gerald D. Hines/The New England Joint Venture for Phase II of their Back Bay project, 222 Berkeley Street, and provides consulting services to F.D.Rich/A.W. Perry on their Washington Street project.

The capabilities and resources of Northeast's principals to effectively address issues in Boston and its surrounding towns has also been enhanced by their extensive experience with Boston community groups through political campaigns. Pamela McDermott was a candidate for the Boston City Council in 1981 (a city wide campaign), and more than 75% of Northeast's employees have direct government and political experience.







# The Boston Globe

SATURDAY, MAY 16, 1987

## REAL ESTATE

### Cooperation Leads to smooth sailing for 125 High St.

By Anthony J. Yudis  
Globe Staff

**W**hen the Hartford-based Travelers Insurance Co. and its development partners asked last month for some zoning changes for a \$200 million, block-long redevelopment project in Boston's financial district, there was no opposition at the public hearing held by the Boston Redevelopment Authority.

The 2.5-acre, 125 High Street project envisions two office buildings, of 30 and 21 stories, three renovated buildings nearby, and an enclosed common space connecting the buildings and containing stores. The project would include construction of public facilities in the block bounded by High, Pearl, Purchase and Oliver streets.

But BRA director Stephen Coyle says it wasn't surprising to him that there was no opposition. He credited the developers for undertaking "a good community process" in the last two years, during which the developers talked to many people.

Coyle said he thinks the project, designed by Jung/Brannen Associates of Boston, is a much better product for the

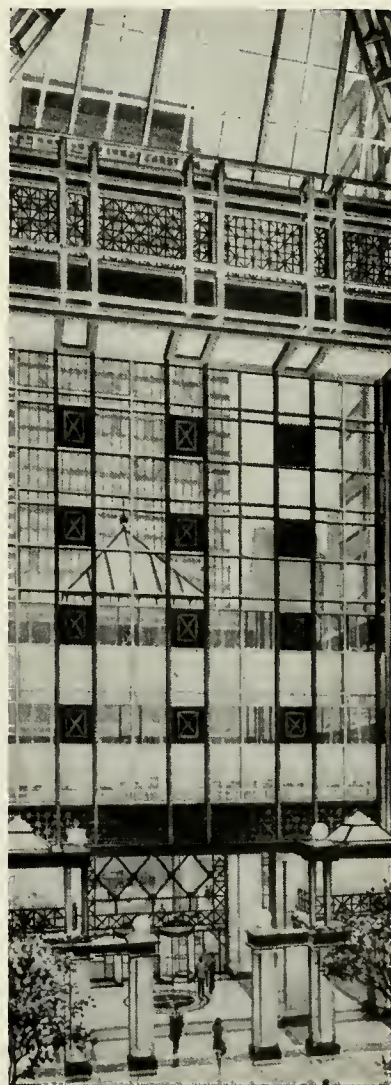
city as a result of that process and the willingness of the developers to listen.

The BRA recently authorized a planned-development-area zoning designation for the project, which will allow the developers to acquire a package of variances needed once final design approval is given. The designation allows a height limit of 400 feet, which is what the city's proposed new downtown zoning laws would allow.

The project now will be one of the first developments to be scrutinized by the new Boston Civic Design Commission. It then will go to the Zoning Commission and the Board of Appeal. It also will need City Council approval for the sale of some city-owned property on the site, including a 35-year-old fire station on Oliver Street and a sliver of land.

A community outreach program was directed by Northeast Management and Marketing Co. headed by Pamela McDermott, president, who said her agency contacted more than 250 neighbors and abutters over about eight months.

"We received feedback from communi-



*F.M. Constantino illustration*

Design for the expansive atrium.





Drawing depicts two towers at 125 High, with revamped buildings at bottom.

ty organizations including the Chamber of Commerce, the Downtown Crossing Association and three historic-preservation groups. We also conducted walking tours of the site, sponsored luncheons and held approximately 100 meetings for interested parties," said McDermott.

What the project had going for it from the beginning was a major commitment from a prominent Boston employer, New England Telephone Co., which is also one of the development partners. The firm agreed to become a prime tenant in the new project and take about 35 to 40 percent of its million square feet of office space. It also agreed to hire 1,000 Boston residents — 500 this year and 500 next. It plans to consolidate 1,850 existing jobs in the city into the new project and create 150 jobs.

A third development partner, the real estate development and consulting company Spaulding & Slye of Cambridge, also has made a commitment to move its corporate headquarters into the project from its present Cambridge base.

Peter Small, president of Spaulding & Slye, said about 40 employees will move

back to Boston, where Spaulding originated. When the firm developed the New England Executive Park in Burlington, it moved its operations there. Since then it has developed CambridgePark, an office park near the Alewife Brook Parkway transit station in Cambridge and moved its headquarters there.

But Small says most of its administrative staff will not come to Boston, since, "We have about 180 to 200 people out there who are not used to commuting into the city or dealing with the Central Artery."

Small said he and his associates have worked closely with the BRA, and the procedure was one of cooperation rather than confrontation. But the cooperation will mean the developers spend some money on agreed-upon areas such as:

- They will rehabilitate three four-to-six-story buildings at Oliver and Purchase streets, something that pleases the Boston Preservation Alliance.

- The telephone company plans to open an Alexander Graham Bell museum in the project area as, among other things, a field trip site for Boston's students.

- The developers will build a modern fire station for the city within the project area. They also will include space for a two-bay ambulance facility, the first in the downtown financial district.

- The developers will contribute a \$75,000 mobile "jobstop" van, the first in the city, which will enable the city's jobs-recruiting program to reach all 17 Boston neighborhoods. The mobile unit will supplement the city's network of proposed permanent neighborhood "jobstop" locations.

In addition, the project should provide a mandatory \$7.5 million in linkage payments to the city to be used for producing affordable housing, and about \$4.2 million annually in additional real estate taxes.

Developers also brought in some detailed plans to mitigate transportation problems as well.

Travelers is developing the site through the Prospect Co. of Hartford, the insurance firm's real estate arm. Directing the local development activities is Brian Gabriel of Simsbury, Conn., vice president of Prospect.



# THE BOSTON LEDGER

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## A New Way of Conducting Business Helps Avoid Rifts

125 High St. builders give return favors

By John Becker

Development in downtown Boston is usually the stuff of which controversies are made. But the proposed 125 High Street project in the Financial District is unusual for the feathers it hasn't ruffled. A team of astute developers has hit on a marketing scheme that seems unbeatable: give the people what they want.

Building a large office complex on a 2.5-acre site next to the Central Artery could have been the source of a confrontation with concerned citizens and interest groups. But the Prospect Company and Spaulding and Slye Company, co-owners and co-developers of the 1.4-million-square-foot project, which will include a 30-story building and a 21-story building, sought from the first to adapt their design to meet the needs of the Boston community.

Dave McGarry, of the Cambridge-based Spaulding and Slye Company, put it this way: "When you go in just saying 'We're going to be building an office project here,' people might think 'I don't want another office building,' or 'If there's going to be one, how's it going to help me?' And when you say good things, it makes it much easier."

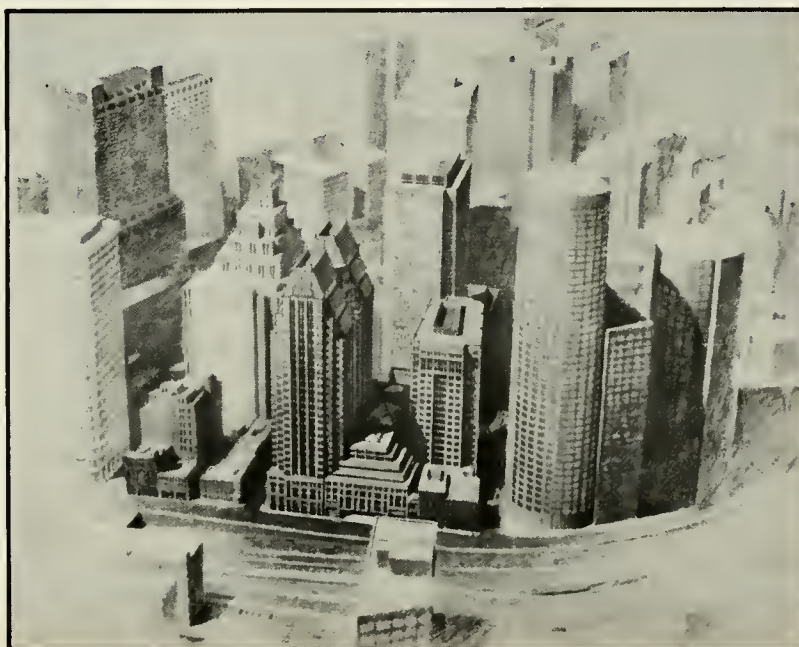
Spaulding and Slye and The Prospect Company, the real estate arm of Travelers Insurance, which owns most of the site and occupies a 16-story building there, enlisted New England Telephone (NET) as the third member of the pro-

ject team. NET agreed to locate its new headquarters in one of the 125 High Street office buildings, bringing in hundreds of new jobs and retaining or consolidating several thousand others in Boston through consolidation.

Throughout its history, the 125 High Street team seems to have been intent on providing something for everyone. They joined with the city's Office of Jobs and Community Services (OJCS) on the new Boston for Boston jobs initiative, promising to build a new firehouse for the

Boston Fire Department and an ambulance facility for the Health and Hospitals Department. They will preserve and renovate three 19th Century buildings located on the site. They reduced the height of the tallest building from 600 to 400 feet after some concerns were raised, and are building a parking garage and adding a lane to adjacent Purchase Street to alleviate potential traffic problems.

Add to this the lack of residential opposition in the largely non-residential Financial District and a dynamic public





relations campaign by Northeast Management and Marketing Company, and you have a project with which it is difficult to find fault.

The Boston Redevelopment Authority (BRA) found little to fault in the project team's outreach efforts. The BRA's Ralph Memola commented, "They went out and met with people, made numerous presentations, adapted their project as they went along to the concerns that people raised at various points in the review process.

And their efforts seem to have paid off. The BRA voted on May 7 to approve the project's development plan and its development project impact plan. The BRA then petitioned the Boston Zoning Commission for designation of the site as a Planned Development Area (PDA); such a designation, available only for large projects, will simplify much of the paperwork done in the future on the project. The 125 High Street development received its initial Planned Development Area approval from the Zoning Commission in early June.

The development team and the BRA are now working "cooperatively," McGarry said, as they continue the design review and approval process. Memola commented, "There has been remarkably little controversy. In fact, there has been rather strong support for the program."

Perhaps the single most outstanding feature of the 125 High Street project public-mindedness is the "New Boston Jobs Program." According to McGarry, each member of the development team will contribute something to the program. Spaulding and Slye, by deciding to relocate their corporate offices at the 125 High Street site, will bring 40 new jobs to Boston. New England Telephone, by consolidating its headquarters at the site with a 20-year lease, has made a "long-term commitment to . . . staying in the city of Boston," noted Robert Talbot, NET's District Manager for Real Estate Operations. As part of its commitment to the program, and to jobs for Boston residents, NET has agreed to hire 1,000 Boston residents for new jobs in 1987 and 1988.

By participating in the Boston for Boston initiative, the developers have

promised to hire Boston residents for 50 percent of the jobs in their buildings — jobs like building technicians and engineers, security guards, and parking lot attendants. In addition, tenants of a building within the Boston for Boston program are entitled to the job training and referral resources provided by OJCS: Ann Donner of OJCS told the Ledger that developers are using the program "as an amenity to attract, saying 'here is free employment referral.'"

The money for the program comes, in part, from linkage payments. For every square foot in the project over 100,000 square feet, one dollar goes to job training and five dollars go to housing. Since the job training linkage payments are required, McGarry said, it benefits the developer to take part in the jobs issue. "We know we were going to be paying a certain amount of linkage dollars in terms of housing and in terms of job training," McGarry noted. "We figure if we're going to be paying these dollars, let's try to have some input into what the money goes toward."

For its part in the New Boston Jobs Program, the Prospect Company is donating to OJCS its first and only mobile Jobstart van, a traveling job training, referral, and recruitment center to serve Boston's neighborhoods. The mobile Jobstart will eventually be part of a seven-Jobstart system with a number of permanent locations around Boston. Permanent Jobstarts are already planned for Roxbury, South Boston, and Charlestown. According to Donner, the donation of the Jobstart van "represents a real sincere commitment on the part of 125 High Street to ensure that everyone in the city has these opportunities made available to them."

But jobs are not the only asset 125 High Street promises to bring Boston. The development team has agreed to replace the Boston Fire Department (BFD) facility on the site of the project with a 'state-of-the-art' fire house, McGarry said. Chief Paul Cook of the BFD was pleased with the arrangement: "What we have worked out between the architect, the developer, and the BRA will give us just about everything we want." He expressed caution though, saying, "You're

never certain on a thing like this, because there are so many other factors."

As mentioned above, the 125 High Street plans include the restoration of three 19th-century buildings at the corner of Oliver and Purchase Streets. Two of the structures were built in the 1880's by architect John Hall, according to Steve Jerome of the Boston Landmarks Commission. Jerome explained that the buildings are an excellent example of late Victorian mercantile architecture. One of the buildings will be renovated to house downtown Boston's first and only ambulance facility.

And to please the culturally-minded, New England Telephone plans to create a communications museum named after Alexander Graham Bell in the first-floor atrium of the project.

All this additional public benefit comes on top of the public benefits built into the Boston development process: 125 High Street will contribute \$7.5 million in linkage fees. The job training component, as mentioned above, will help to bolster OJCS programs. The housing component will probably go to the Neighborhood Housing Trust, according to Ted Doyle. Property taxes from the development will add another \$5.6 million in revenues for the city.

The design review and community outreach processes continue, but from all accounts the 125 High Street development seems a sure thing. The success of the project sends a message to developers who forget to ask, "How will this help Boston?" If the response by OJCS and the BRA are any indication, projects like 125 High Street — projects that downplay confrontation and emphasize the public benefits of their proposals — may soon become the standard against which others are judged.

OJCS's Ann Donner made the case succinctly: "I think that when a developer comes forth and does something new, it signals perhaps to other people who have projects under approval that this is a new way — that this is the way we do business in Boston. It's positive for both the developer and the city as a whole — and we hope people follow their example."



## MONTHLY REAL ESTATE SUPPLEMENT



photos by Stuart Garfield

# The anatomy of an office building

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by John King

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The official unveiling of 125 Summer St. was perhaps the most carefully scripted presentation ever given to the Boston Redevelopment Authority board of directors.

First, architect Arthur May showed slides of the proposed building and its surroundings, explaining how the new 23-story tower would take part in a stylistic dialogue with nearby South Station. An engineer followed with a description of the building's traffic access plan (*see BBJ, Aug. 11*). There was a discussion of the developer's intent to build affordable housing in Chinatown and letters of support from local developers, the Chinatown/South Cove Neighborhood Council and the Boston Landmarks Commission.

And no opposition. The board voted unanimously to let the tower be built, then moved to the hearing's next item.

"We didn't want to leave any stone unturned," developer Richard Eichorn explained later. "We felt it was necessary to make sure everybody understood what we were trying to do."



As much as any formal guideline, those words of Eichorn—who heads the Boston office of Jaymont Properties, co-developer of 125 Summer with A.W. Perry Inc.—indicate the path that future development in downtown Boston is likely to take.

The July 17 approval of 125 Summer is significant for two reasons. It is the first large office building to originate in and emerge from director Stephen Coyle's BRA, with no roots in former Mayor Kevin White's administration.

Also, 125 Summer could easily have triggered an acrimonious battle over growth—just like International Place, or the New England Life building, or 101 Arch or Exchange Place. Like the latter two buildings, 125 Summer involves the construction of a new office tower behind the facades of existing low-rise buildings. The new and the old will be forcibly combined.

The very fact that it didn't become a battle makes 125 Summer worthy of close examination. It also suggests that the BRA and developers might finally be learning from past mistakes.

When completed in early 1989 at a cost of approximately \$100 million, 125 Summer will be a 23-story, 480,000-square-foot office tower cloaked elaborately in granite and glass. There will be underground parking and ground-floor retail.

The site seems ideal. Bounded by the surface artery and Summer, Lincoln and South streets, 125 Summer is a hub within the Hub, the visual terminus of High Street, Summer Street and the South Station area. The heart of the financial district is a few blocks away; so is Downtown Crossing.

### **Difficult but desirable**

From a planning viewpoint, though, the block is as difficult as it is attractive. The presence of the 600-foot-high 1 Financial Center and the 415-foot Blue Cross/Blue Shield building argues for a tower on the site; however, Chinatown and a cluster of century-old granite buildings are also neighbors. The block itself contains nine 19th-century buildings and a 70-foot-high Central Artery ventilation shaft.

A few years ago, the block caught the eye of the Rockefeller family, which entered into a joint development agreement with Perry, longtime owner of the site's buildings. Shortly afterward, the BRA's 1983 Downtown Crossing plan proposed a 650,000-square-foot high rise for the block.

When the Rockefellers pulled out for personal reasons, Perry searched for a new

partner. Early last year, it settled on Jaymont Properties, a development firm that owns or manages more than 5 million square feet of commercial real estate across the country.

Next, the joint venture selected an architect: Kohn Pedersen Fox, a nine-year-old New York firm known for its postmodern style. KPF (architect for the 101 Federal St. building now under construction) prides itself on contextual designs that acknowledge their surroundings—a necessary quality in this case.

When developers first approached the BRA last fall, they decided to present a set of alternative concepts rather than a specific design. Each retained the facades of four of the existing buildings along Summer Street; each incorporated nearby state- and city-owned land to the Perry site; and each alternative was roughly 600 feet tall.

Too high, said the BRA. "They wanted to create a real 'point' building, something very symmetrical that called attention to itself," said Victor Karen, the BRA architect assigned to the project. "They were going in the right direction as far as retaining buildings of historic value and public improvements, but we were concerned about the height."

The block borders the Essex Street Corridor, an area where the BRA is encouraging development of office towers, but the agency let it be known that the definition of "high rise" in Boston is being scaled down from what was allowed in the past—or outlined in the 1983 study. Except in special cases, the new height limit was 300 feet.

After a month or two of internal debate, Jaymont and Perry decided to go along.

"We knew we were the first major project that was going to be approved by the Flynn administration and the new group at the BRA," Eichorn explained. "To fight for more stories didn't seem worth the trouble. Coyle gave us clear directions as to height, and we chose to follow them."

The developers returned to the BRA in January with an entirely different building proposal. 125 Summer was now 300 feet high, with an asymmetrical L-shaped design. Also, the site contained no state or city land. The vent stayed.

"Once we knew the height limit, it didn't make sense financially to pull additional land into the design," Eichorn said. "The economics didn't support it."

Another factor seems to have been a desire to get the building approved as quickly as possible. If the joint venture had pressed





**Project manager Joseph Fallon, Jaymont partner Richard Eichorn and A.W. Perry president S. Maxwell Beal. To compensate for a lack of height, the developers chose an ornate design.**

the issue, it might have gotten an extra hundred feet. But the effort would have taken months and introduced a set of connected, possibly disabling issues—from the negotiations involved in purchasing government land to public criticism of a building felt to be too tall. As it stands now, 125 Summer's target completion date of early 1989 puts it in a marketable vacuum, with clusters of projects opening before and after.

Eichorn is reluctant to say that such considerations were important. "We'd be less than true to ourselves if we said we didn't think about those issues and they weren't a factor," he said. "Timing is always important in any project this size. But what's more important than the time aspect is getting the project right."

With the height issue settled, the review process accelerated.

"A lot of factors go into reviewing a building, and any one of them can hold up the process," said Susan Allen, the BRA's assistant director for development and urban design. "Once the debate on massing and height was behind us, we could move on to other issues."

Some had little to do with design. The BRA required studies on how the building would affect wind, shadow and traffic

patterns in the area—common requirements, but in the past such studies weren't done until the latter stages of review. And in Allen's words, "It makes sense to do impact analysis in the early stages of review, and get environmental information before major massing decisions. . . . You can only do so much [wind protection] with canopies and trees."

BRA project coordinator Pam Wessling, meanwhile, worked with the developers on arranging a partnership with the Chinese Consolidated Benevolent Association to build housing in Chinatown using 125 Summer's \$1.29 million in linkage payments.

"We knew we didn't want to just dump our linkage money into a fund, but we didn't have the expertise to do it [build housing] ourselves," Eichorn said. "It was a team effort."

Weekly meetings took place between BRA planners and the joint venture team, including senior project manager Joseph Fallon, KPF design partner Arthur May and KPF project manager Glenn Garrison. Specific sections of the building were tackled at specific meetings; one week, for instance, May and Garrison brought in a cardboard model of the building with sev-



eral different attachable tops to stimulate the discussion. Similar effort was spent making sure the new portions of the five-story base complemented the old.

Perhaps the thorniest design question concerned the site's existing buildings. While there was agreement early on as to which building facades along Summer Street should be preserved, Lincoln Street was a different matter. One building of acknowledged merit will be demolished because the developers consider it incompatible with the parking garage entrance set for that point.

According to Garrison, incorporating old buildings into a new design can be difficult. "People are much more conscious about preservation today," he said. "It's a good thing, but it makes the integration of new design with old buildings much more difficult. You find yourself facing the danger saying 'Wait a minute—this is our building, not an 1870s building.'"

### **Grafting not always the answer**

Conversely, some preservationists remain opposed to the grafting of new onto old, a la Exchange Place, where an eight-story granite facade is attached to a 40-story glass tower.

"I don't think this is what one would call preservation—it is a case of trying to be sensitive and mitigate impacts," said Antonia Pollak, executive director of the Boston Preservation Alliance. "We made our position known, that we supported full retention of the [existing] buildings. But we had no way to back that up."

Other observers are happy with KPF's efforts. "They deserve a lot of credit for understanding that there is a base there to build upon," said Matthew Coogan, state undersecretary of transportation.

Both Pollak and Coogan received presentations at various stages of 125 Summer's gestation. Project manager Fallon estimates he made roughly 70 presentations to concerned groups and individuals. "We made an effort to talk to as many interested and disinterested people as possible," Fallon said. "You have to be open and receptive."

Coogan put it another way. "Joe Fallon is a very skillful merchant of his wares," he said. "What he does is talk to everybody and deal with problems before they're problems."

One result was an abundance of suggestions on the fine points of making the building blend into the area. At the same time, because the building lacks an attention-getting height, a strong and effective

design became crucial to, in Garrison's words, move the building "A focal point. The level of detail and shapes and forms have to make it outstanding."

Despite the difficulty of the task and the range of opinions, Eichorn feels KPF managed to keep control of the design. "You have to have a strong architect," he said, adding that the BRA deserves credit for restraint. "They didn't say, 'We have to have this here,' or 'You have to make this change.' They said, 'We have these concerns.' They know that design by committee doesn't work."

By the time the schematic drawings and environmental studies were formally presented to the BRA in May, the building had taken on its current appearance. There were further refinements—two extra levels of parking were added and an inside galleria was angled slightly to allow for retail space on both sides—but the work that led to the July 17 vote was essentially complete.

Final design drawings are still being completed, and actual building materials have yet to be selected (the shade of granite, for instance). And, obviously, the building hasn't been built. Nonetheless, Jaymont and Perry are satisfied with the progress made so far.

"It's an extremely attractive building," said S. Maxwell Beal, president of A.W. Perry. "The size initially was somewhat of a disappointment, since with a larger parcel we perhaps could have had something more prominent on the skyline, but I have no complaints with the present scale of land to buildings. It should have real quality."

There's also satisfaction at the BRA—not just with the design, but with the way that a virtually untried process performed. "With more definite guidelines the process will be shorter, but developers have started to realize the controls we do have," Allen said. "They understand now that we are processing buildings in a design and city context, not individually."

Controversy over development isn't about to become extinct—ask anyone concerned with the Prudential Center expansion plan or the Fan Pier project. However, 125 Summer showed that rhetoric about lower heights and developer responsibility can produce results. And a difficult building in a delicate site can take shape without the influence of lawsuits. □



# Meredith & Grew, Incorporated

## Kevin C. Phelan

Mr. Kevin C. Phelan, is a partner and director of Meredith & Grew and serves as the Senior Vice President of the Real Estate Finance Department

Mr. Phelan earned his B.A. in Business Administration at Providence College, and his M.B.A. at Boston College. He joined Meredith & Grew in 1978 after an 11-year career as a lending officer at State Street Bank and Trust. He served as Loan Correspondent for Travelers in New England, contacts sources of funds nationwide to find financing for developers, and finds properties to fit into lenders' and investors' portfolios.

He currently serves as a member of the Mortgage Finance Committee, Boston Affairs Committee, and the Brokers Institute of the Greater Boston Real Estate Board. He is Vice Chairman of the Economic Development and Industrial Commission of Boston, and of the Clean City Commission for the City of Boston. He is Past President of the University Club of Boston. He is a Corporator of the New England Home for Little Wanderers and of the New England Deaconess Hospital and is a Member of Deaconess's Development Council and its Real Estate subcommittee. He is on the Board of Trustees of the Catholic Charitable Bureau of the Archdiocese of Boston, and was past President of that body, is a member of the Board of Directors of the Boys and Girls Clubs of Boston, of the Ex-Ten Club of the Jaycees, and of the Freedom Trail Foundation.







# Meredith & Grew, Incorporated

THOMAS J. HYNES, JR.

Meredith & Grew, Incorporated  
Executive Vice President, Director  
160 Federal Street  
Boston, Massachusetts 02110

**Education:** Boston College; Bachelor of Arts, 1961

**Employment:** - 1965 to date, Meredith & Grew, Incorporated  
Mr. Hynes has had experience in the sale, leasing and consulting of real estate since 1965. Activities have included office lease negotiations for landlords and tenants for several million square feet of office space. Experience has included the purchase, sale, and leasing of commercial, industrial, and institutional properties in the United States and Canada.

**Professional Organizations:** Greater Boston Real Estate Board, President 1984; First Vice President 1983; Clerk, 1980-1982  
Massachusetts Association of Realtors  
National Association of Real Estate Boards  
Urban Land Institute, Associate Member  
Real Estate Round Table

**Other Pertinent Data:** Newworld Bank, Director and Member of the Executive Committee  
Wilson Tisdale Company, Director  
Boston Ballet, Trustee  
John Fitzgerald Kennedy Library Foundation, Director  
Emmanuel College, Chairman of the Board of Trustees  
Marine Biological Institute, Trustee  
MASCO, Director  
Corporation Member of the Eye Research Institute of The Retina Foundation  
Greater Boston Chamber of Commerce, Executives Club President 1979-1980, Chairman 1980-1981  
Greater Boston Convention and Visitors Bureau, Director







# Meredith & Grew, Incorporated

160 Federal Street  
Boston, Massachusetts 02110-1701

(617) 330-8000  
Telecopier (617) 330-8130

November 4, 1987

Mr. Jay R. Schochet  
President  
Schochet Associates  
720 Statler Office Building  
Boston, MA 02116

Dear Jay:

It is our pleasure to participate with you in the submission of Parcel-to-Parcel 2 at Park Square as exclusive leasing agent for the project. Meredith & Grew has a long history of successfully leasing new office buildings such as 100 Federal Street, John Hancock Tower, The Devonshire, Five Hundred Boylston Street, and 150 Federal Street, as well as many rehab buildings like 160 Federal Street, 400 Atlantic Avenue, 470 Atlantic Avenue and the Stuart Building.

Our research department tracks all leasing activity in Boston and the Greater Metropolitan area, and based on moving averages of absorption, we are confident that Boston's office economy will maintain a healthy absorption of office space over the next five years. With the combination of financial services, legal, accounting, advertising, and corporate uses, the core economy in Boston should remain strong. Our balanced economy which includes high technology and defense in the suburbs, the software industry in Cambridge, and education and health care throughout the Boston area, reinforce the needs of Boston-based tenants. The Boston area economy is very well positioned to withstand an economic shock or recession economy vs. the rest of the nation. It is our opinion that we will weather any downward cycle as well as lead in any upturn cycle.

Absorption trends combined with the downsizing of office projects and the initiation of the IPOD zoning regulations will tend to constrain the supply of office space, making approved projects coming into the pipeline attractive alternatives for Boston tenants. We think the Park Square location will continually be upgraded and enhanced and will be dramatically improved with the development of your project.

We feel that your office component should be successfully leased at your pro forma rates based on our experience leasing mixed-use residential and office projects like The Devonshire and the use of an innovative marketing presentation.







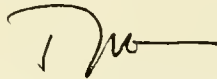
## Meredith & Grew, Incorporated

Mr. Jay R. Schochet  
November 4, 1987  
Page 2

I have enclosed our third quarter 1987 market overview, office vacancy report, absorption trend analysis for office space, and projected vacancy rates for various levels of absorption in the Financial District and the Back Bay through December 31, 1990.

All indicators point to a positive response to your project and we are pleased to be part of your team.

Very truly yours,



Thomas J. Hynes, Jr.  
Executive Vice President

TJHjr/kal

Enclosures







# **Meredith & Grew, Incorporated**

## **BOSTON EXCLUSIVE LEASING ASSIGNMENTS**

Meredith & Grew has been instrumental in the success of many real estate projects in Boston and has an unsurpassed track record of leasing in Boston office buildings. Meredith & Grew has served as exclusive leasing agent for the following projects:

### **Five Hundred Boylston Street**

Meredith & Grew represented New England Mutual Life Insurance Company (The New England) in site assembly for its 1,200,000 square foot, \$300 million Boston office complex; negotiations with the joint venture partner, Gerald D. Hines Interests; negotiations with the City for development rights for the project; and is exclusive leasing agent for Five Hundred Boylston Street, the first phase of the project. The building is 100% committed six months prior to completion of the project.

### **160 Federal Street**

Meredith & Grew is exclusive leasing agent for 160 Federal Street, The Landmark, a 24-story art-deco historic office building containing 340,000 square feet of rentable area. The Landmark was totally recycled into first-class office space. Major tenants include Price Waterhouse, Scudder, Stevens & Clark, and Meredith & Grew.

### **150 Federal Street**

150 Federal Street is a 28-story, 520,000 square foot new office building scheduled for delivery in mid-1988. The building was masterplanned with the recycling of 160 Federal Street. The prime tenant is Bingham, Dana & Gould, one of Boston's largest law firms. 150 and 160 Federal Street together contain over 800,000 square feet of office space, 30,000 square feet of retail spaces, 400 car parking. An enclosed pedestrian street and atrium connect High Street and Federal Street and the lobbies of 150 and 160 Federal Street. Meredith & Grew is exclusive leasing and managing agent and development consultant for the entire project.

### **200 State Street**

200 State Street is a mixed-use development comprised of 297,000 square feet of office space and 60,000 square feet of retail space. Major office tenants include Travelers Insurance Company, Lexington Insurance Company, Touche Ross/Braxton, and E.F. Hutton. By capitalizing on the State Street address, physically segregating the retail, emphasizing parking and the amenities, Meredith & Grew successfully secured these major tenants and other commitments ensuring a successful leasing of the property. Meredith & Grew also acted as consultant to the developer, arranged the financing, and is the management agent for the project.







# **Meredith & Grew, Incorporated**

## **John Hancock Mutual Life Insurance Company**

Meredith & Grew, as exclusive leasing agent for John Hancock, was instrumental in helping the developer overcome unexpected adversity in marketing non-Hancock occupied space at its corporate headquarters building. Meredith & Grew essentially had to lease the project twice after problems developed with the building's curtain wall. Due to consistent performance, Meredith & Grew remains as exclusive leasing agent for John Hancock at this 1,500,000 square foot, 60-story office tower, the largest in Boston, 16 years after being engaged as exclusive agent.

## **400 Atlantic Avenue**

400 Atlantic Avenue is a rehabilitation of a waterfront building into 100,000 square feet of first-class office space adjacent to Rows and Foster Wharf. The project was located in a previously unproven market location beyond the fringe of the financial district. As exclusive leasing agent, Meredith & Grew negotiated a major anchor tenancy with the law firm of Goulston & Storrs and successfully leased the balance of the project. Meredith & Grew also represented Bain & Company in the sale of the building to the Northland Investment Corp.

## **One Devonshire Place**

Meredith & Grew represented Devonshire Associates for the office and retail components of this mixed-use project. Despite the projects perception as a residential tower, Meredith & Grew leased the entire 137,000 square feet to one user, AT&T.

## **380 Stuart Street**

380 Stuart Street is a rehabilitated office building in a secondary Back Bay location. Meredith & Grew successfully preleased the entire 145,000 square feet of office space in a soft office market. Meredith & Grew also sold the property to the Northland Investment Corp., and arranged the permanent financing.

## **470 Atlantic Avenue**

470 Atlantic Avenue is a 330,000 square foot waterfront office building. As in the case of 400 Atlantic Avenue, Meredith & Grew, on behalf of the developer, was successful in leasing up the project despite the perception in the marketplace that the project was in an unproven location. Meredith & Grew has represented three successive owners as exclusive leasing agent.







# **Meredith & Grew, Incorporated**

## **100 Federal Street**

Meredith & Grew assembled one of the most prestigious sites in the City of Boston at 100 Federal Street for the Bank of Boston corporate headquarters. As exclusive leasing agent for the 1,355,000 square foot, 38-story project, Meredith & Grew successfully leased the non-bank occupied space without a day of vacancy. Five years after leaseup, Meredith & Grew, in several complex simultaneous transactions, negotiated cancellations or leases for the vacated 150,000 square feet of Stone & Webster floors involving multiple parties including Bank of Boston, Stone & Webster, United Shoe Machinery Corporation, and Sullivan & Worcester.

## **Stone & Webster Engineering Corporation**

Meredith & Grew has represented Stone & Webster Engineering Corporation in its real estate requirements for over ten years. Meredith & Grew represented Stone & Webster in its negotiations to acquire a site for its million square foot office building in Boston. Meredith & Grew also represented the firm in the acquisition of over half a million square feet of office space in Boston, subleasing of 250,000 square feet to Boston Edison Company, purchase of 150,000 square foot building for renovation to office use. Meredith & Grew has negotiated over two million square feet of real estate transactions for Stone & Webster subsidiaries, and involving many individual transactions, both in the acquisition and disposition of various space needs in Boston, the U.S. and Canada.

## **51 Sleeper Street**

Meredith & Grew was exclusive leasing agent for this 150,000 square foot rehab office building and leased the entire building to Blue Cross/Blue Shield.







# Meredith & Grew, Incorporated

## OVERVIEW

The Greater Boston Real Estate Market's performance through the first three quarters of 1987 has been unexpectedly strong. Unprecedented expansion by Boston's service firms have contributed to what will be the strongest year ever for the downtown real estate market while increased activity in the suburban high tech market has begun to strengthen the R&D sector.

Throughout the past two years, leasing activity downtown has been at an all time high. Analysis of 1987 transactions by industry indicates that law firms have been the most active, both in number of firms and total square feet footage, and have leased more than 494,000 square feet in 27 transactions. Close behind are the financial service firms which leased some 450,000 square feet in 20 deals, and insurance firms follow, leasing 189,000 square feet in 13 deals.

In 1986, law firms were also the most active, but only with regard to the number of firms in the market. There were 42 deals executed by law firms and 34 deals executed by financial services firms. The expansion of financial service firms involved the leasing of more than a million square feet, nearly two times the amount of space leased by law firms.

In Boston the vacancy rate has increased to 7.1% as more than 3.5 million square feet of office space have been delivered to the market. The increase in the vacancy rate would have been greater had it not been for the record absorption of more than 2.2 million square feet through the first three quarters of 1987. There are currently 4.7 million square feet of office space under construction and 65.7% of that space is pre-leased.

The vacancy rate for direct space in the suburban office market is currently 13.7%, a decline of 2.6% since the beginning of the year. The R&D vacancy rate has also declined during the year and is now 13.6%, a decrease of 4.1%. While the vacancy rates have come down in the suburbs, the amount of sublease space, an important market barometer of company consolidation, has increased. The amount of sublease space in the suburban office market increased more than 100,000 square feet for a total of 605,000 square feet, while the amount of R&D sublease space has more than doubled to 421,000 square feet.

On a broader scale, the outlook for the region to the year 2000 is one of growth. The National Planning Association forecasts an additional 775,000 new jobs in the Boston Metropolitan Region, second only to the Los Angeles Metro Region.







# Meredith & Grew, Incorporated

## OVERVIEW - CONTINUED

Nevertheless, should a national economic slowdown ensue, business expansion in the Greater Boston market will be effected, but Boston is well-equipped to weather any storm given its balanced and revitalized economy.

On the next few pages you will find market summaries for vacancy rates, absorption, and rental rates. They are broken down by office and R&D space. Combined figures are also available.







# Meredith & Grew, Incorporated

## FINANCIAL DISTRICT

Despite a 6.4% expansion in supply and the migration of Homeowners Federal Savings, The Travelers, Cabot Corporation, and others to the suburbs, the vacancy rate in the Financial District has increased only .3% since the beginning of the year to 6.1%. It has taken more than 1.2 million square feet of net absorption to constrain the vacancy rate, the same amount that was absorbed in all of last year. The increase in demand will be greater this year than in any other in the Financial District's history.

The weighted average asking rental rate has increased from the \$31-\$32 per square foot level at which it hovered for nearly two years. The addition of One International Place, 99 Summer Street and Rowes Wharf caused rates to rise above \$36 per square foot. Nationally, Boston ranks second behind Manhattan (Midtown) according to The Office Network's Fall/Winter 1987 International Office Market Report.

Increased land costs, a longer and more stringent approval process, and linkage payments have all contributed significantly to higher development costs. Asking rents range from the mid \$30's to the high \$40's per square foot for the bulk of the buildings under construction.

Expected to come on line in 1988 are 101 Arch Street (373,252 square feet), 101 Federal Street (543,000 square feet), 150 Federal Street (518,642 square feet), 75 State Street (700,000 square feet), and 20 and 21 Custom House (222,106 square feet combined). Developers of 125 Summer Street began site work earlier this year for their 23 story, 480,000 square foot project. Although actual construction of the building has not yet begun, it is already more than 75% pre-leased, an indication of the aggressive deals being offered.







# Meredith & Grew, Incorporated

## BACK BAY

The Back Bay vacancy rate remains in the 2% to 4% range, falling .8% since the start of the year to 2.5%. Market constraints should prevent the vacancy rate from falling much further. Consequently, without any significant increase in supply, net absorption will not increase much above the 40,991 square feet already absorbed this year.

The demand in the Back Bay has spawned a number of rehabilitation projects - there is presently more than 400,000 square feet of rehab office space under construction. Projects include: 360 Newbury Street (66,800 square feet), 420 Boylston Street (90,000 square feet), 745 Boylston Street (100,000 square feet) and 95 Berkeley Street (85,000 square feet). Pre-leasing to date has been particularly slow in light of the low vacancy rate in this market.

The only additions to supply this year will be 38 and 360 Newbury Street (110,000 square feet total). In 1988, however, we will see the delivery of more than a million square feet of office space, including more than 770,000 square feet of new class A space. Five Hundred Boylston (650,000 square feet) and Heritage on the Garden (111,000 square feet) are both due to come on line next spring.

Further out on the horizon there are more than 2 million square feet of office space in the planning stages. Proposals include: Five Hundred Boylston - Phase II (480,000 square feet), 10 Saint James Avenue (500,000 square feet) and 116 Huntington Avenue (250,000 square feet).

Over the short term, vacant space may be expected to dwindle and spill-over demand may flow to the Financial District or, possibly, East Cambridge. Mellon Financial Services, Hartford Insurance, and David C. Babson Company are all Boston firms that have leased space in Cambridge.







10/27/87  
VACSUMMO

EXISTING							CONSTRUCTION			
	# OF BLDGS	CURRENT SUPPLY	DIRECT SPACE AVAILABLE	VAC. RATE	WGHTD ASKING RENT	AVG ASKING RENT	# OF BLDGS	UNDER CONSTRUCTN	SPACE AVAILABLE	VAC. RATE
BOSTON:										
BACK BAY FINANCIAL DISTRICT	27 91	6,826,695 23,084,781	173,915 1,402,457	2.5% 6.1%	\$25.29 \$36.80	\$27.48 \$33.02	6 7	1,057,841 2,820,054	411,914 1,941,303	38.9% 68.8%
*	118	29,911,476	1,576,372	5.3%	\$35.53	\$31.91	13	3,877,895	2,353,217	60.7%
CHARLESTOWN										
FORT POINT CHANNEL	6	1,084,025	256,000	23.6%	\$23.13	\$17.96	3	158,917	96,000	60.4%
LEATHER DISTRICT	15	1,683,921	433,571	25.7%	\$19.37	\$20.57	3	308,000	308,000	100.0%
NORTH STATION	8	569,677	56,986	10.0%	\$20.88	\$19.99	1	162,000	162,000	100.0%
	11	533,289	64,762	12.1%	\$19.27	\$19.57	2	150,400	138,400	92.0%
*	40	3,870,912	811,319	21.0%	\$20.66	\$21.11	9	779,317	704,400	90.4%
* TOTAL FOR BOSTON	158	33,782,388	2,387,691	7.1%	\$30.48	\$29.42	22	4,657,212	3,057,617	65.7%
SUBURBS:										
CAMBRIDGE	46	6,035,583	746,881	12.3%	\$26.22	\$24.15	2	300,000	145,000	48.3%
ROUTE 128 WEST	211	15,749,775	2,480,611	15.8%	\$20.27	\$20.15	5	684,000	653,725	95.6%
ROUTE 495 WEST	64	4,761,065	735,412	15.4%	\$17.46	\$18.40	3	209,772	209,772	100.0%
ROUTES 3/93 NORTH	25	3,317,800	409,440	12.3%	\$14.24	\$14.38	0	0	0	0.0%
ROUTE 128 SOUTH	58	5,715,635	503,627	8.8%	\$18.87	\$18.05	7	790,000	605,000	76.6%
* TOTAL FOR SUBURBS	404	35,599,858	4,875,971	13.7%	\$20.11	\$20.00	17	1,983,772	1,613,497	81.3%
TOTAL FOR ALL MARKETS	562	69,382,246	7,263,662	10.5%	\$23.52	\$24.86	39	6,640,984	4,671,114	70.3%







ABSORPTION TREND ANALYSIS FOR OFFICE SPACE  
FOR THE THIRD QUARTER ENDING SEPTEMBER 30, 1987

10-27-87  
QANALO

	EOY 1986 SUPPLY	EOY 1986 DEMAND	VACANCY / + SUBLEASE	3RD QTR 87 SUPPLY	3RD QTR 87 DEMAND	VACANCY / + SUBLEASE	NET ABSORPTION
<b>BOSTON:</b>							
BACK BAY FINANCIAL DISTRICT	6,826,695 21,692,788	6,599,224 20,444,914	3.3 / 4.0 5.8 / 6.8	6,826,695 23,084,781	6,652,780 21,682,324	2.5 / 3.4 6.1 / 7.1	40,991 1,242,730
*	28,519,483	27,044,138	5.2 / 6.1	29,911,476	28,335,104	5.3 / 6.2	1,283,721
CHARLESTOWN FORT POINT CHANNEL LEATHER DISTRICT NORTH STATION	436,257 1,300,921 436,683 423,310	376,857 1,119,103 284,428 363,399	13.6 / 13.6 14.0 / 15.4 34.9 / 34.9 14.2 / 19.3	1,084,025 1,683,921 569,677 533,289	828,025 1,250,350 512,691 468,527	23.6 / 23.6 25.7 / 26.1 10.0 / 10.5 12.1 / 13.2	451,168 144,019 225,653 121,241
*	2,597,171	2,143,787	17.5 / 19.0	3,870,912	3,059,593	21.0 / 21.3	942,081
* TOTAL FOR BOSTON -	31,116,654	29,187,925	6.2 / 7.2	33,782,388	31,394,697	7.1 / 7.9	2,225,802
<b>SUBURBS:</b>							
CAMBRIDGE ROUTE 128 WEST ROUTE 495 WEST ROUTES 3/93 NORTH ROUTE 128 SOUTH	5,363,583 15,384,775 4,321,293 3,229,800 5,329,451	4,310,081 12,652,280 3,830,486 2,803,316 4,537,286	19.6 / 21.6 17.8 / 19.7 11.4 / 11.4 13.2 / 13.9 14.9 / 16.1	6,040,583 15,749,775 4,761,065 3,317,800 5,715,635	5,293,702 13,269,164 4,025,653 2,908,360 5,212,008	12.4 / 13.4 15.8 / 18.4 15.4 / 16.1 12.3 / 13.4 8.8 / 10.0	1,024,896 508,394 166,267 92,044 676,022
* TOTAL FOR SUBURBS -	33,628,902	28,133,449	16.3 / 17.8	35,584,858	30,708,887	13.7 / 15.4	2,467,623
* TOTAL FOR ALL MARKETS -	64,745,556	57,321,374	11.5 / 12.7	69,367,246	62,103,584	10.5 / 11.8	4,693,425

NOTE: SUBLEASE SPACE IS FACTORED INTO THE NET ABSORPTION CALCULATION







PROJECTED VACANCY RATES FOR DIFFERENT LEVELS OF ABSORPTION  
FINANCIAL DISTRICT AND ROCKBRY

ABSORPTION (SF/YEAR):	12/31/87		6/30/88		12/31/88		6/30/89		12/31/89		6/30/90		12/31/90	
	SUPPLY	VAC.	SUPPLY	VAC.	SUPPLY	VAC.	SUPPLY	VAC.	SUPPLY	VAC.	SUPPLY	VAC.	SUPPLY	VAC.
750,000	30,629,888	7.5%	32,151,380	10.7%	33,664,571	13.6%	33,664,571	12.5%	34,144,571	12.7%	34,144,571	11.6%	35,077,571	12.8%
1,000,000	30,629,888	7.1%	32,151,380	10.0%	33,664,571	12.5%	33,664,571	11.0%	34,144,571	10.8%	34,144,571	9.4%	35,077,571	10.3%
1,250,000	30,629,888	6.7%	32,151,380	9.2%	33,664,571	11.4%	33,664,571	9.6%	34,144,571	9.0%	34,144,571	7.2%	35,077,571	7.9%
1,500,000	30,629,888	6.3%	32,151,380	8.4%	33,664,571	10.3%	33,664,571	8.1%	34,144,571	7.2%	34,144,571	5.0%	35,077,571	5.4%
1,750,000	30,629,888	5.9%	32,151,380	7.6%	33,664,571	9.2%	33,664,571	6.6%	34,144,571	5.3%	34,144,571	2.8%	35,077,571	2.9%

DELIVERIES SCHEDULED					PRE-LEASED		VAC.	
PROJECT	S.F.	DELIVERY						
101 ARCH STREET	373,352	30 87	143,000		61,70%			
ROMES MARKET	340,000	40 87	287,000		15.59%			
38 MEMBURY STREET	44,000	40 87	28,000		36.36%			
360 MEMBURY STREET	66,800	40 87	15,000		77.54%			
150 FEDERAL STREET	518,642	10 88	203,000		60.86%			
HERITAGE ON THE GARDEN	111,850	20 88	18,850		83.15%			
20 CUSTON HOUSE STREET	145,000	20 88	48,150		66.79%			
21 CUSTON HOUSE STREET	86,000	20 88	10,100		88.26%			
500 BOYLSTON STREET	660,000	20 88	660,000		0.00%			
420 BOYLSTON STREET	90,000	30 88	0		100.00%			
745 BOYLSTON STREET	95,191	30 88	0		100.00%			
101 FEDERAL STREET	543,000	30 88	0		100.00%			
75 STATE STREET	700,000	30 88	67,000		90.43%			
95 BARKLEY STREET	85,000	40 88	0		100.00%			
125 SUMMER STREET	480,000	30 89	364,250		24.11%			
125 HIGH STREET - PHASE I	933,000	40 90	450,000		51.77%			
	5,271,835		2,294,350		56.48%			

FUTURE		S.F.
500 BOYLSTON STREET - PH II		480,000
125 HIGH STREET - PHASE II		423,000
INTERNATIONAL PLACE - PH II		728,000
116 HUNTINGTON AVENUE		250,000
222 BARKLEY STREET		450,000
25 HUNTINGTON STREET		60,000
10 SAINT JAMES AVENUE		500,000

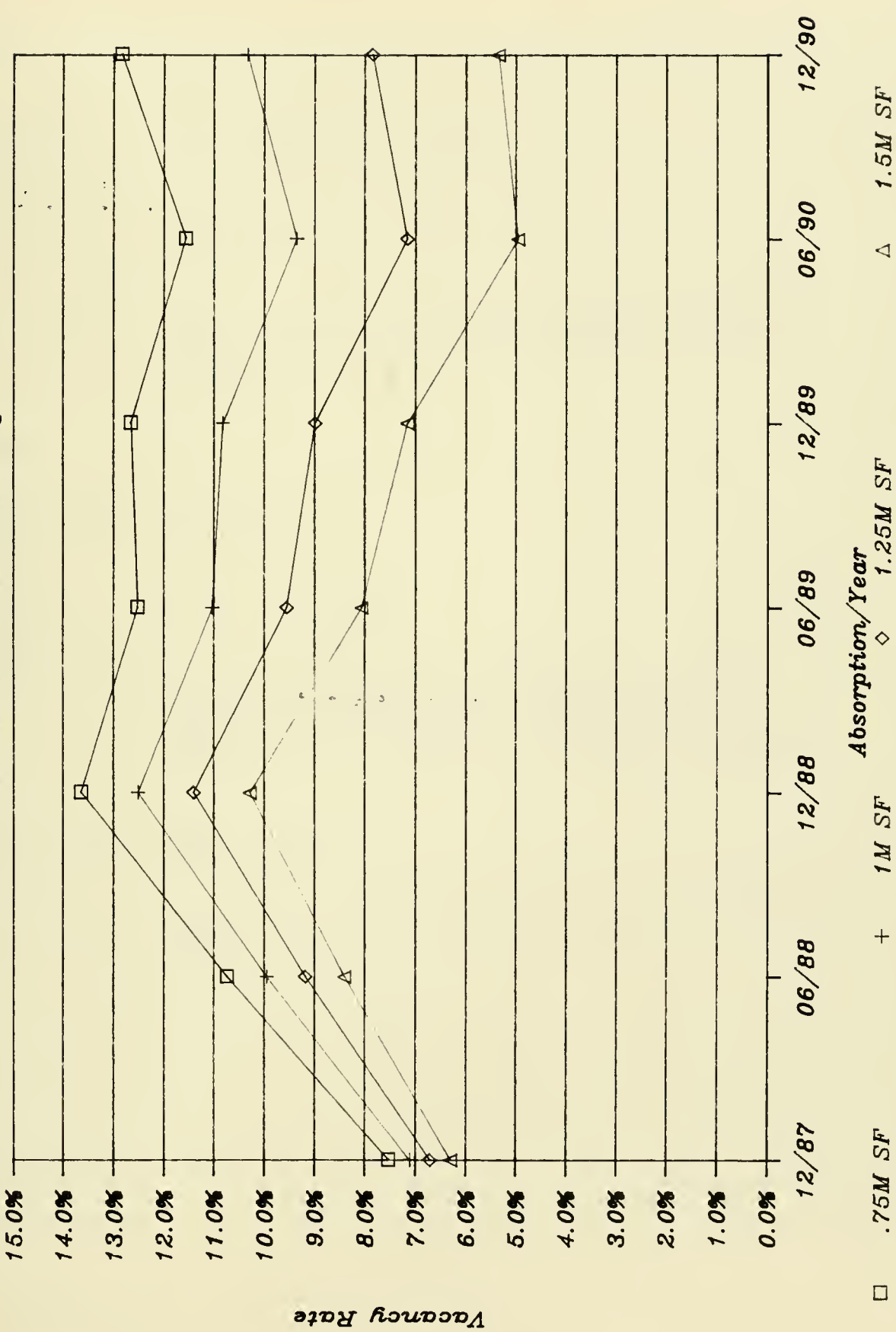






# PROJECTED VACANCY RATES

For Financial District and Back Bay









# Meredith & Grew, Incorporated

PROJECT: The Landmark Buildings

LOCATION: 160 Federal Street  
Boston, MA

DESCRIPTION: Loan obtained was for the rehabilitation of this two-story red brick building that used to be the headquarters of the USM Corporation.

OWNER: Federal Development

LOAN AMOUNT: \$56,000,000

LENDER: Bank of Boston

DESCRIPTION: A new 518,000 square foot, 28-story silver and grey glass office building, with a five-story atrium and 14,000 square feet of retail space. Completion expected in early 1988.

LOAN AMOUNT: \$125,000,000

LENDER: Citicorp and Copley Real Estate/New England Life







# 150 & 160 FEDERAL STREET BOSTON



CONGRESS & MATTHEWS STREET VIEW

OWNER'S REPRESENTATIVE  
**Meredith & Grew**







# Meredith & Grew, Incorporated

PROJECT: Marketplace Center

LOCATION: 200 State Street  
Boston, MA

DESCRIPTION: A 16-story granite and glass complex next to Faneuil Hall consisting of 285,000 square feet of office space and 60,000 square feet of retail space.

OWNER: Marketplace Associates

LOAN AMOUNT: Construction loan of \$57,000,000

LENDER: Citicorp

LOAN AMOUNT: Permanent loan of \$74,000,000

LENDER: Aetna Life















# Meredith & Grew, Incorporated

PROJECT: Burroughs Wharf

LOCATION: North Ferry Pier and the Coal Pocket Building  
Boston, MA

DESCRIPTION: This is a construction loan on the Coal  
Pocket building, with a 97-space park  
garage, a new pier for fireboats, 10 boat  
slips, and 67 luxury condominium units

OWNER: Kenney Associates

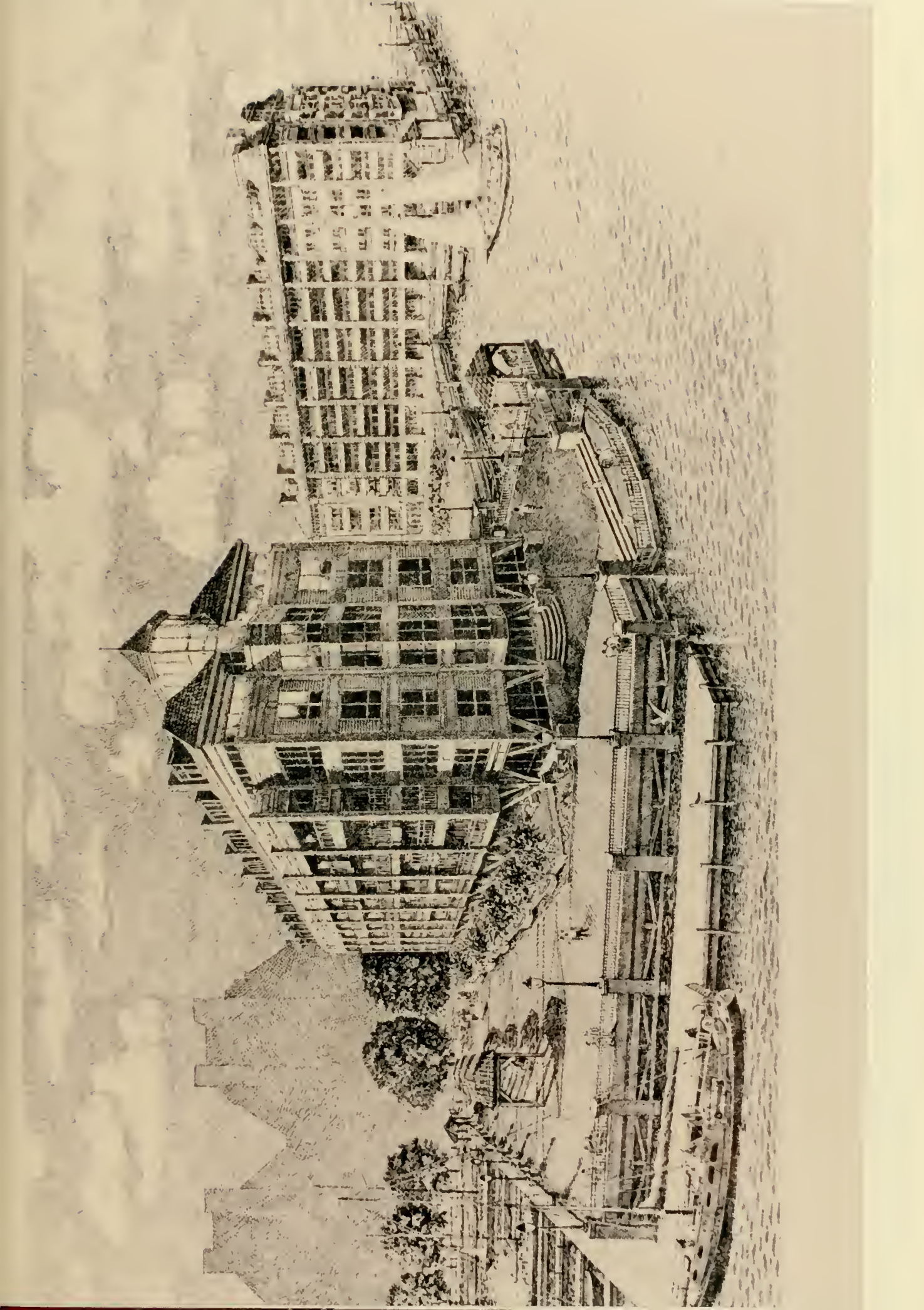
LOAN AMOUNT: \$47,000,000

LENDER: Union Warren/Lloyd's Bank















# Meredith & Grew, Incorporated

PROJECT: One Alewife Place

LOCATION: One Alewife Place  
Cambridge, MA

DESCRIPTION: A three-story steel frame office building  
with brick and ribbon glass exterior with an  
atrium entrance and parking for 348 cars.

OWNER: Schochet Associates

LOAN AMOUNT: \$17,100,000

LENDER: Travelers









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Samuel E. Mintz-Principal

EDUCATION AND HONORS

Lawrence Institute of Technology, Detroit Michigan  
Wayne State University, Detroit, Michigan  
University of Michigan, Ann Arbor, Michigan

Bachelor of Architecture, Cum Laude, North Carolina  
State University, 1958

Recipient of Fulbright Scholarship, Post Graduate  
Study at the Architectural Association of London.  
Thesis was Educational Building Construction  
Program in Great Britain following World War II.

PROFESSIONAL  
EXPERIENCE

Prior to Mr. Mintz organizing Mintz Associates  
Architects/Planners, Inc., he accumulated twelve  
years of professional architecture and planning  
experience in Detroit and Ann Arbor, Michigan;  
Raleigh, North Carolina; London, England; and  
Cambridge and Boston, Massachusetts where he  
worked in such firms as Victor Gruen and Associates  
and Sert Jackson and Gourley and Associates. In  
1961 he was engaged as the Director of Planning and  
Design for Boston's Downtown Waterfront-Faneuil Hall  
Urban Renewal Project and for approximately the next  
four years directed efforts toward developing the  
Waterfront Plan which is now nearly complete.

Since 1964, Mr. Mintz has been Principal of his  
firm, formerly called PARD TEAM, Inc.. The firm,  
under his direction, has completed over \$175,000,000  
in construction these past twenty three years. In  
1965 and 1966 the firm acted as Coordinating Planners  
and Architects for the new city of Reston, Virginia  
being built some 18 miles west of Washington, D.C..  
The firm has been responsible for the Charlesview  
Apartments, a 212 unit development in Allston across  
from Harvard Stadium; the 1000 pupil Hennigan Magnet  
Community Elementary School in Jamaica Plain; the  
381 unit Shore Plaza East development in East Boston;  
the Roxbury Comprehensive Community Health Center in  
Roxbury; over 200 units of rehabilitated housing in  
the South End and Worcester; the 300 unit Heritage  
Elderly Apartment complex in Maverick Square, East  
Boston; the 150 unit Knights of Columbus Elderly  
Housing, in the North End; the 225 unit Patricia  
Hagen White Apartments in Brighton; the 52 unit  
Hamlet Street Housing in Newton; the Essex Bank Re-  
gional Headquarters Office, Peabody; the Bostonian  
Hotel, Boston; the 231 unit South Cove Plaza East &  
West Elderly Housing Buildings, Bay Village; the







EXPERIENCE (CON'T)

recently completed 210 South Street Office Building, Leather District, Boston; Mercury International Headquarters Office, North Attleboro; the 82 unit Courtyard Condominium Housing Development in Charlestown; and currently under construction the 43 unit Pine Brook Estate Condominium Housing Development in Peabody; and the 449 unit Harbor Point (Columbia Point) Mixed Income Housing Complex, Dorchester.

In addition to these, the firm was also responsible for planning projects including the Watertown Arsenal Boston Gas - Park Square; John Hancock - Copley Sq.; Blue Cross Blue Shield of Massachusetts - Financial District; the Newburyport Waterfront Waterfront Study; and the Downtown-North End Waterfront Study.

TEACHING  
EXPERIENCE

Visting Critic and Guest Lecturer at M.I.T., Harvard, the Boston Architectural Center, Tufts University; Boston College, and Carnegie Mellon University, Pittsburg, Tuskegee University, Alabama.

PROFESSIONAL  
AFFILIATIONS &  
REGISTRATIONS

Member, American Institute of Certified Planners, American Institute of Architects, National Association of Housing and Redevelopment Officials, Massachusetts Construction Industry Council, and Citizens Housing and Planning Association.

Registered Architect, Commonwealth of Massachusetts

National Council of Architectural Registration Boards

PROFESSIONAL  
ACTIVITIES

Participant in Symposium on New Directions for Architecture sponsored by the Royal Institute of British Architects

One year of travel and lecturing in twelve countries from France to Turkey

Delegate to the International Union of Architects Conference in Moscow, Russia in 1958







Samuel E. Mintz  
Page Three

PROFESSIONAL  
ACTIVITIES (CON'T)

An organizer of and presently on the Board of Directors of the Citizens Housing and Planning Association of Metropolitan Boston.

Member of several local and national committees dealing with the Planning-Design aspects of housing.







# MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

## DATA SHEET:

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Year Established: July 1964 (originally as PARD TEAM, Inc.)

Years in Business: 23 Years

Organizational Structure: Private Corporate

Firm Officers: Samuel E. Mintz, A.I.A.-A.I.C.P., President  
Massachusetts Registration #2160  
NCARB Certification  
American Institute of Planners

Board of Directors: Samuel E. Mintz - 100% of Stock

Associates: Tosh Kawakami, Associate  
Massachusetts Registration #2612  
NCARB Certification

Ronald S. Thomas, Associate  
Massachusetts Registration #6465  
NCARB Certification

Average number employed in preceding 6 month period (4)

Mass. Reg. Architects: Average number of Mass. registered architects on payroll (5)

Mass. Reg. Engineers: Average number of Mass. registered engineers on payroll (5)

Technical Employees: Average number of technical employees (10)

Administrative/Clerical/Accounting: Average number of Administrative/Clerical/Accounting employees (2)

Work Categories: Architecture - New Work  
Renovation Work

Planners - Urban Design







## OVERVIEW AND SERVICES:

Mintz Associates Architects/Planners, Inc. (formerly called PARD TEAM, Inc.) was organized in 1964 as an outgrowth of Mr. Mintz's four previous years experience as Director of Planning and Design for the Downtown Waterfront-Faneuil Hall Urban Renewal Project. The integration of planning and architecture in achieving creative environmentally sound cost responsive solutions within client and community restraints is our firm's professional goal.

Our work primarily has been in Massachusetts with the majority in Greater Boston where skillful working with public agencies, community groups and private interests were prerequisites to successful development.

In order to participate in achieving a high quality product and level of success, our firm provides several in-house services and they include the following:

- Programming and Planning
- Site Planning and Urban Design
- Architectural Design
- Interior Design
- Graphic Design
- Construction Documents
- Project Coordination
- Construction Supervision
- Project Implementation







# MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

## ASSOCIATES AND CONSULTANTS:

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### Structural Engineers

Arthur Choo Associates  
David M. Berg Inc.  
Engineers Design Group, Inc.  
KKBNA McNamara/Salvia  
Le Messurier Consultants, Inc.  
Simpson Gumpertz & Heger, Inc.  
Wayne L. Weaver & Associates, Inc.  
Zaldastani Associates, Inc.

### Civil Engineers

Edwards & Kelcey  
H.W. Moore Associates, Inc.  
Thompson & Lichtner Co. Inc.  
C.E. Maguire, Inc.

### Geotechnical-Foundation

Goldberg-Zoino & Associates  
Haley & Aldrich, Inc.  
Geotechnical Consultants of Mass.

### Mechanical Engineers

Environmental Design Engineers, Inc.  
C.A. Crowley Engineering, Inc.  
Shooshanian Engineering Associates, Inc.  
R.G. Vanderweil Engineers

### Electrical Engineers

Cosentini Associates  
Vicent A. DiIorio  
Shooshanian Engineering Associates, Inc.  
R.C. Vanderweil Engineers  
Verne G. Norman Associates  
Goodal Shapiro Associates  
William H.C. Wong







# MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

## Traffic Engineers

Robert C. Blumenthal Associates  
Bruce Campbell & Associates, Inc.  
Segal, Disarcina Associates

## Landscape Architects

Carol R. Johnson & Associates  
Mason & Frey Landscape Architects  
Weinmayer Associates

## CORPORATE DATA:

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### Persons with financial interest in the firm:

Samuel E. Mintz  
70 Mason Terrace  
Brookline, Massachusetts

### Existing contracts with public bodies:

Boston Redevelopment Authority - Existing contract 95% complete - Fee received  
0% - Fees anticipated \$100,000.

Professional Liability Policy Certificate:	301-17-84
Aggregate amount payable:	\$1,000,000
Present policy expiration date:	June 20, 1987







# MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

## EXPERIENCE:

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- I.
  - a. Boston University
  - b. Joseph Mercurio
  - c. New
  - d. Feasibility
  - e. -
  - f. Feasibility Study
  - g. Samuel E. Mintz
  - h. yes
  
- II.
  - a. Pine Brook Estates
  - b. Brian Kravitzsky
  - c. New
  - d. In construction - 25% complete
  - e. \$4,750,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, Isaac Levy
  - h. yes
  
- III.
  - a. Gloucester Landing
  - b. Jeffery Cohen
  - c. New
  - d. 70% through Construction Documents
  - e. \$6,000,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz Ron S. Thomas
  - h. yes
  
- IV.
  - a. 267 Medford Street
  - b. Jeffery Stonberg
  - c. Rehabilitation
  - d. Schematic Design
  - e. \$8,500,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Ron S. Thomas
  - h. yes







## EXPERIENCE:

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- V.
- a. Rockaway at Rocky Neck - Gloucester
  - b. Walter Burrage
  - c. New land and Rehabilitation
  - d. In construction - 95% complete
  - e. \$3,500,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- VI.
- a. Government Center Garage
  - b. Gerry Viverito
  - c. New
  - d. 80% through Contract Documents
  - e. \$22,000,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- VII.
- a. Columbia Point (Harbor Point)
  - b. Marty Jones
  - c. Rehabilitation and New Construction
  - d. In construction - 5% complete
  - e. \$43,500,000
  - f. Complete architectural engineering services (except for supervision)
  - g. Samuel E. Mintz, Ron S. Thomas
  - h. yes
- VIII.
- a. Bostonian Hotel
  - b. Arthur Winn
  - c. New and Rehabilitation
  - d. Construction completed
  - e. \$10,000,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, Robert Harkness
  - h. Robert Harkness is no longer with the firm







# MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

## EXPERIENCE:

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- IX.
- a. Court Yard Condominium
  - b. Bart Perini
  - c. New and Rehabilitation
  - d. Construction completed
  - e. \$9,500,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Jeffery Lechter (from Jacobson Office)
  - h. yes
- X.
- a. Mercury International
  - b. Richard Sebastiao
  - c. New
  - d. Construction completed
  - e. \$3,250,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- XI.
- a. Franklin Institute of Boston
  - b. Dean Michael Mazzola
  - c. Rehabilitation
  - d. Construction completed
  - e. \$1,000,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- XII.
- a. 210 South Street
  - b. Richard Cohen
  - c. Rehabilitation
  - d. Construction completed
  - e. \$5,500,000
  - f. Complete architectural engineering services (except for supervision)
  - g. Samuel E. Mintz, Michael Harrison
  - h. Michael Harrison is no longer with the firm







MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

EXPERIENCE:

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- XIII.
- a. Green Street Station - Orange Line Southwest Corridor
  - b. Daniel Ocasio
  - c. New
  - d. Construction completed
  - e. \$3,400,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, (Joint Venture with The
  - h. Leon Bridges Company, Architects & Planners, Baltimore, MD)
- XIV.
- a. South Cove Plaza - East & West
  - b. Stanley Chen
  - c. New
  - d. Construction completed
  - e. \$10,200,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, James Heiberg
  - h. James Heiberg is no longer with the firm
- XV.
- a. May Hall - Framingham State College
  - b. DCPO (formerly B.B.C.)
  - c. Rehabilitation
  - d. Construction completed
  - e. \$2,100,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, Marc Margulies
  - h. Marc Margulies is no longer with the firm
- XVI.
- a. Downtown-North End Boston Waterfront Study
  - b. Boston Redevelopment Authority, Stephen Coyle, Christopher Grace
  - c. Urban Design-Planning
  - d. Work completed
  - e. -
  - f. Planning, Urban Design, Development Feasibility
  - g. Samuel E. Mintz, Ron S. Thomas
  - h. yes







## MINTZ ASSOCIATES ARCHITECTS/PLANNERS, INC.

### EXPERIENCE:

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- XVII.
- a. Patricia Hagen White Housing for the Elderly, Brighton, Boston
  - b. Thomas Little
  - c. New
  - d. Construction Completed
  - e. \$6,500,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- XVIII.
- a. Bostonian Hotel
  - b. Arthur Winn
  - c. Rehabilitation and New
  - d. Construction completed Phase II
  - e. \$10,250,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, Robert Harkness
  - h. Robert Harkness is no longer with the firm
- XIX.
- a. Christopher Columbus Plaza - North End, Boston
  - b. Edward Fish
  - c. New
  - d. Construction completed
  - e. \$5,100,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami
  - h. yes
- XX.
- a. Hamlet Street Housing - Newton, MA
  - b. Newton Community Development Foundation
  - c. New
  - d. Construction completed
  - e. \$1,650,000
  - f. Complete architectural engineering services
  - g. Samuel E. Mintz, Tosh Kawakami, Joseph Guerino
  - h. Josheph Guerino is no longer with the firm







**Mintz Associates**  
Architects/Planners, Inc.







# Mintz Associates Architects/Planners, Inc.

North Street  
Boston, Massachusetts 02109  
Telephone: (617) 523-3705

Mintz Associates Architects/Planners, Inc. is a moderate-size firm that since 1965 has completed some thirty projects, from small to large scale, the value of which exceeds \$150,000,000. The majority of these projects are residential, office, retail, hotel, commercial, institutional, educational and medical projects are located in Massachusetts.

The firm's working process, developed and refined over twenty years, is to find creative, responsible, innovative cost-effective planning and design solutions to meet complex environmental, aesthetic and economic building needs of client, community and user.

Samuel E. Mintz, AIA-APA, Principal of the firm, received his architecture and planning education at Lawrence Institute of Technology, Wayne State University, the University of Michigan and North Carolina State University, where he received his Bachelor of Architecture Degree Cum Laude in 1958. He was subsequently awarded a Fulbright Scholarship to Great Britain where he spent a year as a post graduate student, assistant teacher and guest critic at the Architectural Association of London, participated in a symposium on New Directions for Architecture sponsored by the Royal Institute of British Architects and served as guest lecturer and critic at Leeds University and the University of London. During an additional year in Europe, he was a student delegate to the International Union of Architects Congress in Moscow and was invited to give a presentation on "The Modern Architecture Movement in America" at Moscow University's School of Architecture.

In this country Mr. Mintz has been a speaker at the North Carolina Chapter of the

American Institute of Architects, a guest lecturer at Carnegie Mellon University in Pittsburgh, Boston University and Tufts University, a visiting juror at Harvard and MIT and teacher of the final year at the Boston Architectural Center.

Prior to forming Mintz Associates, he acquired twelve years of professional experience in Detroit and Ann Arbor, Raleigh, Cambridge and Boston, working for Victor Gruen and Associates, George Matsumoto and Associates and Sert, Jackson, Gourley and Associates. From 1961 to 1964, he was Director of Planning and Design for Boston's Downtown Waterfront Faneuil Hall Urban Renewal Project under the joint auspices of The Greater Boston Chamber of Commerce and The Boston Redevelopment Authority. He is a founding member and is on the Board of Directors of the Citizens Housing and Planning Association.

Mr. Mintz involves himself in all phases of each project, supported by highly skilled associates and staff. The type of projects undertaken are those which most effectively

*the Bostonian Hotel, Blackstone Block, Boston*  
Developer: Winn Development Company  
Contractor: Perini Corporation



*the Courtyard Condominiums, Charlestown, Boston*  
Developer: Paramount Development Associates, Inc.  
Contractor: Perini Corporation



*Essex Bank, Regional Headquarters, Woburn, Massachusetts*  
Owner: Essex Bank  
Contractor: Morse Diesel









tively utilize the firm's philosophy and professional abilities to achieve meaningful results.

**Typical Projects**

*The Bostonian Hotel*—located in the historic Blackstone Block across from Faneuil Hall Marketplace: 155 guest rooms, 130 seat restaurant, 70 seat cocktail lounge and 100 seat meeting rooms.

*Shore Plaza East*—located on the waterfront in the Eagle Hill neighborhood in East Boston: 451 units of family housing.

*Essex Bank, Regional Headquarters Building*—located in the North Shore Shopping Center in Peabody: 150,000 square foot office building.

*Franklin Institute of Boston*—located at Berkeley and Tremont Streets in the South End: classrooms and administrative wing surrounding a plaza.

*Patricia Hagen White Apartments*—located at Washington and Corey Road in Brighton: 225 units of elderly housing.

*Roxbury Comprehensive Community Health Center*—located on Warren Street in Roxbury: 33,000 square foot outpatient facility.

*Christopher Columbus Apartments*—located at the edge of the North End neighborhood across from Waterfront Park: 151 units of elderly housing.

*May Hall at Framingham State College*—rehabilitation of important historic building into classrooms, the Arts Department and faculty offices.

*210 South Street Office Building*—located at the corner of South and Kneeland Streets in the Leather District: 100,000 square foot historic rehabilitation.

*The Courtyard*—located adjacent to Harvard Park on Harvard and Main Streets in Charlestown: 80 units condominium housing.

**Partial Client List**

Blue Cross Blue Shield  
City of Boston  
City of Chelsea  
City of Newburyport  
Cohen Properties

Coolidge Bank and Trust  
Corcoran Mullins and Jennison  
Essex Conifer Bank  
Franklin Institute of Boston  
Hilton Hotel Corporation  
John Hancock Mutual Life Insurance Company  
Lidapell Development Corporation  
Massachusetts Bay Transportation Authority  
Massachusetts Division of Capital Planning and Operations  
Massachusetts Port Authority  
Mercury International Trading Corporation  
Metropolitan Properties  
Peabody Properties  
Perini Land and Development Corporation  
Richard H. Rubin Management Corporation  
Sheraton Corporation  
United Community Development Corporation  
Winn Development Company



*The Rockaway at Rocky Neck, Gloucester, Massachusetts*  
**Developer:** Rockaway Rocky Neck Corporation  
**Contractor:** Sugarloaf Construction Company



*Roxbury Comprehensive Community Health Center, Roxbury, Boston*  
**Developer:** United Community Development Corporation  
**Contractor:** Peabody Construction



*Christopher Columbus Apartments, North End, Boston*  
**Developer:** Peabody Properties  
**Contractor:** Peabody Construction







JAMES J. MARCELLINO

GASTON SNOW & ELY BARTLETT

Associate, 1971; Partner, 1975.

Bar Admission: Massachusetts, 1968; United States District Courts (Massachusetts and Northern District of California); United States Courts of Appeals (First and Ninth Circuits).

EDUCATION:

Boston University Graduate School of Management, 1976  
Boston College Law School, 1968  
The College of the Holy Cross, 1965

LEGAL EXPERIENCE:

Litigation/Dispute Resolution: Litigation/resolution of technology-based disputes, with trial and appellate experience in the areas of contract, copyright, trade secret, unfair competition, valuation, vendor/user and other business disputes. Trial counsel for prevailing party in SAS Institute Inc. v. S&H Computer Systems, Inc., 605 F.Supp. 816 (M.D. Tenn. 1985).

OTHER RELEVANT EXPERIENCE:

Boston Redevelopment Authority, 1969-1971: Project Director and attorney for the Downtown Waterfront-Faneuil Hall Renewal Area (last position).

Massachusetts Attorney General's Department, 1969-1970: Deputy Assistant and Special Assistant Attorney General in the Division of Health, Education and Welfare.

Boston College Law School, 1983-current: Visiting Professor, High Technology Law.







# JOHN K. DINEEN



## GASTON SNOW & ELY BARTLETT

Partner - 1970 to present Management Committee and Executive Committee Member  
1970 to present (except 1983-84)

Ely, Bartlett, Brown & Proctor - Partner - 1970 to merger forming Gaston Snow & Ely Bartlett Weston, Patrick & Stevens, 1954 to 1966

Special Assistant Attorney General, Commonwealth of Massachusetts

Counsel to Commission to Reorganize State Government, 1967-68 Peabody & Arnold - Partner - 1967 to 1970

Bar Admission: Massachusetts 1954; Maine 1954

## EDUCATION:

University of Maine, B.A., 1951

Boston University School of Law, J.D., 1954

## LEGAL EXPERIENCE:

General practice with emphasis on development, financing and leasing of real estate.

## BUSINESS AFFILIATIONS:

Serve on Board of Directors of Coolidge Bank and Trust Company (Executive Committee) and of several privately held companies including Stowell Wood Products, Inc.; The Codman Company, Inc.; Town & City Properties Boston, Inc. and Central & District Properties Boston, Inc. (United States subsidiaries of Sterling Guarantee Trust, a publicly held United Kingdom corporation); Westways Village, Inc.; Dingle American Properties, Ltd. (Irish corporation in County Kerry, Ireland)

## CIVIC AFFILIATIONS:

### Present:

Boston Local Development Corporation President and Trustee Greater Boston Chamber of Commerce Executives Club Member; The Waring School Trustee and Executive Committee Member; University Hospital Trustee, Development Committee Chairman

### Former:

Emanuel College Trustee;  
Hebron Academy Trustee;  
Nahant Finance Committee; Nahant Historical Society Trustee; Nahant Republican Town Committee Member University of Maine Alumni Association Executive Committee; Winsor School Trustee







## INTRODUCTION TO REAL ESTATE DEPARTMENT

The Real Estate Department, now located on the 33rd Floor, includes seven partners, one Of Counsel, 15 associates, two rotatees, three paralegals and three title examiners. Working with us are seventeen secretaries, three people on the day-time word processing staff and five on the night word processing staff, a librarian, a receptionist and six people on the mailroom staff. The word processing staff, the receptionist, the librarian and the mailroom staff also serve the other departments on this floor; namely, health care, public finance and reorganization.

Real estate covers a lot of ground, and so does the Real Estate Department of Gaston Snow & Ely Bartlett. We represent buyers and sellers of all kinds of real estate, lessors, lessees, developers, borrowers, lenders and public authorities - anyone who deals in any way with real estate.

A number of people within the Department specialize in environmental matters, since environmental laws and regulations play an increasing role in the development and use of real estate.

Most of our work is for commercial and industrial clients. Our residential work is largely limited to work for the staff of this firm and for clients for whom we do other legal work. We do not represent lending banks in handling residential loans, except in respect of large developments where we represent the developer or when the borrower is a member of the staff of this firm or a person who is a client of the firm in other areas.

Among the lenders whom we represent on a regular basis are the Shawmut Bank, the State Street Bank, Provident Institution for Savings, Essexbank, the Coolidge Bank and the Eliot Bank.

We represent the Krupp Companies, John Hancock and Dean Witter in major acquisitions and, in the case of Dean Witter, in financing. Among the developers we represent are Awdeh and Company, K. Hovnanian, the Flatley Company, Boston Wharf Company, Rose Associates, F.D. Rich Company and A. W. Perry, as well as the Massachusetts General Hospital in the development of its new replacement facilities. We have done all of the real estate work (as well as other work) for the Massachusetts Turnpike Authority for many, many years. More recently we have been representing the Massachusetts Water Resources Authority in its efforts to acquire title to the Quincy Shipyard. We are also counsel to the Massachusetts Government Land Bank and Massachusetts Industrial Finance Authority.







We are counsel for Greater Boston Real Estate Board, of which Phil Lapatin is Assistant Clerk. Phil represents a good many Realtors and writes a regular column for the Board discussing recent developments in the law.

Many people in the Department are experienced and skilled in dealing with zoning and other land use regulation matters and appear regularly before planning boards and zoning boards of appeals.

We certify titles to all of the major title companies and are agents for Chicago Title Insurance Company, First American Insurance Company and Ticor Title Insurance Company..

All of us in the Department have special areas in which we tend to concentrate but, as a team, we cover all areas of real estate law and practice and take pride in doing high quality work in a timely manner.







Boston  
Herald  
7/7/87

## Four Hub law firms make top-100 list

JUST four Boston law firms took in enough in gross revenues during the last fiscal year to be included in a list of the top 100 U.S. law firms, according to a survey by The American Lawyer magazine.

New York City, with 33 firms on the recently published list, had three times the number of companies represented in the Top 100 than second-ranked Chicago, which had 11.

Washington, D.C., and Los Angeles were tied for third with eight firms, followed by San Francisco with seven, Philadelphia with six, and Houston, which like Boston, had four firms included in the list.

The top firm in the survey was New York-based Skadden, Arps, Slate, Meagher & Flom, with

around \$228 million in gross revenues in its most recently completed fiscal year. No. 2 was Finley, Kumble, Wagner, Heine, Underberg, Manley, Myerson & Casey of New York with \$158 million, followed by Chicago-based Baker & McKenzie, which had \$157 million in gross revenues.

Gaston Snow & Ely Bartlett grossed more than any other Boston law firm, according to the survey. The \$67 million in revenues it took in during its last fiscal year put it in 41st place on the Top 100 list.

Hale and Dorr was Boston's second representative, ranked 57th with \$56 million while Goodwin, Procter & Hoar, and Ropes & Gray both took in \$52 million in revenue to tie for the 65th position.







# Sullivan & Cromwell Leads Law Firm Ranking

Sullivan & Cromwell placed first in a ranking of law firms that were involved with IPOs in 1986 as the counsel for the underwriter. As it did in 1985 (See *The IPO Reporter*, 1/27/86), Sullivan & Cromwell dominated the ranking, handling IPOs totaling \$3.8 billion, almost twice as much as the number two firm, Skadden Arps Slate Meagher & Flom.

The accompanying table lists the top 25 law firms for IPOs in 1986, as ranked by the total dollar amount of the IPOs handled by the firm as underwriter counsel. The table also includes data about the IPOs handled by these firms as counsel for the issuer. While the data shows that some law firms take a large part of the business of being counsel for underwriters, issuer counsel activity tends to be more spread out with no one firm dominating the ranking since issuers of IPOs often use a local law firm.

As it did in 1985, Sullivan & Cromwell handled many of the IPOs book managed by Goldman Sachs. It also was involved with several of the large closed-end investment company IPOs underwritten by Prudential-Bache Securities, as well as issues for First Boston, Lazard Freres and Kidder Peabody, among others. The firm also served as issuer counsel for seven deals totaling \$1.1 billion. The issues were primarily closed-end investment companies.

Skadden Arps served as underwriter counsel for a number of managers and was one of the more prolific issuer counsels, handling eight deals totaling \$767 million. The issues were from a variety of industries ranging from drug stores to a mutual insurance company to a firm that intends to engage in leveraged buyouts.

The number three firm, Cravath Swaine & Moore, handled a number of IPOs for PaineWebber and L.F. Rothschild, among others, while the number four firm, Brown & Wood, primarily handled IPOs book managed by Merrill Lynch. Brown & Wood was the busiest underwriter counsel, working on 44 issues totaling \$1.7 billion. Davis

(Continued on following page)

Leading Law Firms For IPOs In 1986

Law Firm	Counsel for Underwriter			Counsel for Issuer		
	\$ Amt (Mils)	# of Issues	Avg \$ Amt (Mils)	\$ Amt (Mils)	# of Issues	Avg \$ Amt (Mils)
1. Sullivan & Cromwell	3,753.9	26	144.4	1,104.1	7	157.7
2. Skadden Arps Slate	1,949.4	22	88.6	767.4	8	95.9
3. Cravath Swaine & Moore	1,889.7	18	105.0	425.6	2	212.8
4. Brown & Wood	1,740.7	44	39.6	85.8	2	42.9
5. Davis Polk & Wardwell	1,403.4	27	52.0	406.4	3	135.5
6. Simpson Thacher & Bartlett	1,126.1	13	86.6	101.5	2	50.8
7. Cahill Gordon & Reindel	1,052.0	25	42.1	-	-	-
8. Andrews & Kurth	869.1	9	96.6	100.0	1	100.0
9. Wilkie Farr & Gallagher	501.0	16	31.3	1,397.8	8	174.7
10. Cleary Gottlieb Steen	430.3	6	71.7	-	-	-
11. Hunton & Williams	380.5	5	76.1	-	-	-
12. Chadbourne Parke Whiteside	303.6	2	151.8	-	-	-
13. Kramer Levin Nessen	300.0	1	300.0	-	-	-
14. Ropes & Gray	275.4	9	30.6	85.2	5	17.0
15. Mayer Brown & Platt	271.8	2	135.9	71.8	4	18.0
16. Latham & Watkins	242.2	9	26.9	203.3	5	40.7
17. Fried Frank Harris	197.6	5	39.5	164.7	5	32.9
18. Piper & Marbury	186.1	13	14.3	81.1	2	40.6
19. LeBoeuf Lamb Leiby	168.8	5	33.8	14.5	2	7.3
20. Gaston Snow Beekman	167.5	7	23.9	-	-	-
21. Shearman & Sterling	162.0	4	40.5	573.5	3	191.2
22. Gaston Snow & Ely Bartlett	161.2	9	17.9	907.7	7	129.7
23. Bachner Tally Polevoy	160.6	25	6.4	28.5	5	5.7
24. Stroock & Stroock & Lavan	153.3	7	21.9	118.4	3	39.5
25. Pillsbury Madison & Sutro	137.9	9	15.3	12.0	1	12.0

Note: Ranking based on total dollar amount of IPOs handled by the law firm as underwriter counsel.







Shelter, Inc.  
P.O. Box 516  
Cambridge, MA 02139

Resume of Executive Director

David Whitty has been Executive Director of Shelter, Inc. since March, 1979. He has lead the transformation of Shelter, Inc. from an all-volunteer, low-budget effort, into an expanding and effective anti-homeless service organization.

A native of Westport, Massachusetts, Mr. Whitty has worked with a number of non-profit organizations serving the needs of low income people including having worked as Executive Director of Listen, Inc. in Saugus, as a Counselor with the Pre-Trial Diversion Program in the Second District Court of Fall River, and as an Outreach Worker with Vision-In-Action of Natick.

In addition to administrative and direct service experience with non-profits, Mr. Whitty has taught Social Science courses in both the Day and Evening Divisions of Bristol Community College in Fall River, Massachusetts.

He earned a Master of Arts Degree from Goddard College in 1973 with concentrations in education and community organization, and a Bachelor Degree from the New School For Social Research in 1971 with concentrations in both social science and humanities.

He attained the rank of sergeant during four years in the U.S. Marine Corps, and is a veteran of the Vietnam conflict.

During his tenure with Shelter, Inc., Mr. Whitty has emerged as a forceful and knowledgeable advocate for the homeless. His opinions are regularly sought by public and private sector agencies and by the print and electronic media. Mr. Whitty has voluntarily served on numerous task forces, committees, boards, and study groups concerned with the related social problems of hunger and homelessness.







# Shelter<sup>INC.</sup> Newsletter

NON-PROFIT CHARITABLE ORGANIZATION PROVIDING SHELTER TO THE HOMELESS

SPRING 1987

BOSTON FAMILY SHELTER 267-8081

ADMINISTRATIVE OFFICES 864-8140

CAMBRIDGE SHELTER 547-1885

## Mayor Raymond Flynn at Reopening of Boston Family Shelter

The summer and fall of 1986 brought major changes to the Boston Family Shelter. Extensive renovations were conducted to improve the conditions of the building as well as to improve the time our guests spend with us.

Funding for this project was made possible, in large part, by the City of Boston Public Facilities Department and a Community Development Block Grant. In addition, grants for the renovations were received from foundations and corporations which enabled Shelter, Inc. to create the finest possible living conditions for our guests.

In December, Mayor Raymond Flynn, a number of City of Boston officials and members of the media visited the Boston Family Shelter to tour the newly-renovated facility.

In addition to the funding assistance received from the public and private sectors, Alison Lauriat, President of the Board of Directors, made special note of the consideration and care taken by the contractor, Rodney Solomon - R.C. Solomon Construction Co. Recognition was also made of the considerable contributions to the project made by Thomas Doran/IDPA, architect for the project.

## "Leadership '87" Honorees Announced

**H**old the date! - Tuesday evening, June 16th.

The 1987 "Leadership Awards" event will take place at majestic Memorial Hall, at Harvard University, Cambridge.

Alison S. Lauriat, President of the Shelter, Inc. Board of Directors, stated, "Each year, Shelter, Inc. takes a hard look at the philanthropic community to determine which individual (or individuals) has consistently affected positive change for the hungry and homeless in this area. This year, we are pleased to acknowledge the long-term commitment made by both the corporate sector and the individuals responsible."

The recipients of the "Leadership '87" Awards are Samuel Gerson and Jim Anathan, Chairman of the Board and President of Filene's Basement, along with Maurice Segall and Stanley Berkovitz, Chairman of the Board and Vice President of Consumer and Community Affairs at Zayre Corporation.

Carol F. Anderson, Chairman of the Development Committee, which is planning the event added, "The 'Leadership Award' is the highest honor bestowed by Shelter, Inc. and it is of the utmost importance that the recipients be worthy of it. In the cases of the gentlemen representing Filene's Basement and Zayre Corporation, there is no question that they and their respective companies have done more for the hungry and homeless in the Greater Boston area than any other corporate entity."

"The efforts of these men are not restricted to the assistance given to Shelter, Inc. but have also greatly helped other sheltering organizations along with a variety of other charitable endeavors," added Mrs. Anderson.

Presentation of the awards will take place at Shelter, Inc.'s annual special event to be held this year at Memorial Hall, Cambridge, on Tuesday evening, June 16th. The evening's activities will include the presentation of Awards in Sanders Theatre and a buffet reception in Memorial Hall.

Please hold the date—June 16—and plan to join Shelter, Inc., the Tribute Committee and the community in recognizing the very special contributions the honorees have made to help the homeless. Further information may be obtained by calling Shelter, Inc.'s Administrative office at (617) 864-8140.

## 1987 Walk For Hunger Seeks to Raise \$2 Million

Shelter, Inc. depends on the annual Walk for Hunger for a large portion of the funds needed to provide high quality meals to the guests at our Cambridge Shelter and Boston Family Shelter. This year the Walk will take place on Sunday, May 3rd.

Your support of this effort—either as a walker or a sponsor—helps provide support for over 150 feeding programs across Massachusetts. For information on how to help, contact Mary Kelley at our Cambridge Shelter.





## "A Star is Born" Featuring the BFS

Christmas 1986 will be an occasion for families at the Boston Family Shelter to remember for a long time. Barry Nolan and Sara Edwards, Co-Hosts of WBZ-TV's "Evening Magazine," and the production staff wanted to do something special for the families at the BFS and arrived at our door loaded down with a tree, decorations, wonderful party food and extremely thoughtful gifts for all the kids and moms. A number of families who had been relocated also came back to participate.

The children—all amateur talent—smiled for the cameras and enjoyed a wonderful afternoon of fun, food and activity. Everyone seemed at ease in front of the television cameras and we are very proud of their joint debut on "Evening Magazine" on Christmas Eve. Imagine their excitement when they saw themselves on the screen!



Sharing & Caring with New Friends:  
Sara Edwards and Barry Nolan ended their Christmas  
Eve show with a fine rendition of "Jingle Bells" with  
our children.



**Memorial/Honor Gifts**

Some donors designate their gifts "in memory" of a loved one. A memorial gift to Shelter, Inc. lives on in service to other people and perpetuates the name of a loved one in a way that is especially meaningful. This year the following memorial gifts were made:

**In Memory Of:**

THOMAS BARBERA, SR.  
by: Richard Duffy  
Jose Rodriguez

ALICE CAHILL  
by: the Kelleys

JOANNE DUSCHESNE  
by: Anne-Marie Meeks

CHAZAN FELDMAN  
by: Thomas Fodor

DOROTHY KELLEHER  
by: Robert & Jane Richards

JOHN LORIGAN  
by: Mary A. Kelley

RAYMOND L. McGANN  
by: the Egan Family

MARY O'DONNELL  
by: Mary A. Kelley

SADIE F. RIESMAN  
by: Mary Ellen Welch

JOSEF & FRANCES SEEBAUER  
by: Mary Seebauer Schaefer

**In Honor Of:**

BARBARA FAUERBACH  
by: Fred & Jeanne Fauerbach

CHAIM FRIEDMAN  
by: Thomas Fodor

SHULEM & LEAH GESTETNER  
by: Thomas Fodor

VERA GORDON  
by: Steven R. Gordon

AILEEN LYNCH  
by: Betty Bardige

DR. BEN SIEGEL  
by: Amy & Jeff Willinsky

ADINA & BENJAMIN STEINMETZ  
by: Thomas Fodor

ALICE & ROBERT WOLF  
by: Hans & Elizabeth Wolf

To Shelter, Inc. Endowment Fund

**In Memory Of:**

NICHOLAS VERRENGIA  
by: Mrs. Edward J. Shea

Bequests and deferred gifts can be extremely valuable to non-profit organizations while being quite painless, and even beneficial, to the donors. Contributing through bequests or deferred gifts helps ensure the future of charitable organizations while perpetuating the donor's commitment to helping others. If you are considering this type of donation to Shelter, Inc., please contact Lois Grossman, Director of Development, at (617) 864-8140.

Always consult your attorney or financial advisor when considering your philanthropic plans.

**In Memoriam**

Shelter, Inc. was saddened by the recent passing of Charles Liddell, a former member of our Board of Directors. Mr. Liddell was well-known throughout the Boston area for his lifelong commitment to social services. His compassion and kindness will be missed by many. Our condolences are extended to his wife, Barbara, and his family.

In response to the growing number of people using this method of remembrance for special occasions or as memorials, Shelter, Inc. has designed attractive cards which are sent to inform family, friends and associates of your gift. For more information or to make a gift, please contact Pat Egan, at the Administrative office, (617) 864-8140.



The homeless and hungry need our help throughout the year. Please remember them now.



## Senator Hart Tours the Boston Family Shelter

An overwhelming number of security people, television crews and news reporters arrived at the BFS very early on the morning of February 17 in preparation for a fact-finding visit by former Colorado Senator Gary Hart, candidate for the Democratic presidential nomination.

The tour, arranged by Mayor Raymond Flynn, enabled the Senator to hear firsthand from our guests the types of services available to homeless families in Massachusetts and what is still needed.



During a coffee break, our visitors answered a steady stream of questions from reporters. Pictured left to right are Philip Johnston, Secretary, Executive Office of Human Services; Mayor Raymond Flynn, and Senator Gary Hart.



Intently listening to the concerns of one guest are (left-right) Mayor Flynn, Senator Hart and Barbara Duffy, Program Director at the BFS.

Shelter, Inc. depends upon a strong public/private/voluntary partnership to support our work. In the past year the private sector contribution has grown both in numbers of supporters and gifts.

Shelter, Inc. provides shelter, meals, social services, advocacy and referrals to nearly 1,000 homeless men, women and families each year.

There are many items that are needed on a regular basis in order to provide a comfortable homelike environment.

If you are redecorating your home or office, please consider the donation of furniture, office equipment and other goods to Shelter, Inc.



One of our youngest guests enjoyed some special attention from these VIPs.



## Letter From The Executive Director

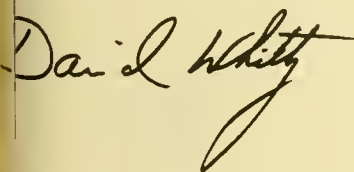
Dear Friends of Shelter:

We are looking forward with growing anticipation to Shelter, Inc.'s annual special event—Leadership '87. Our Development Committee, led by Chairperson Col Anderson, is planning an exciting program. The committee's selections for speakers, guest speaker, master of ceremonies, and event location promise to make Leadership '87 the biggest and most successful event in our history.

Our annual leadership awards event is important to us for many reasons. It is an opportunity to recognize individual efforts to alleviate homelessness; an opportunity to get together with hundreds of concerned individuals and to stand in opposition to growing homelessness in the United States; an opportunity to express support for solutions and for the work of Shelter, Inc.; and an opportunity to raise a substantial amount of the privately contributed dollars upon which Shelter Inc.'s programs depend.

Shelter, Inc. must raise 25% of its operating costs from private contributions. Leadership '87 is a key part of our fundraising plan but it is also a special time of the year when a great many people who are deeply disturbed by the extent of homelessness in this country will gather to make an important statement, teach each other about their concern, their commitment, and their understanding of the need to support Shelter, Inc.

We do hope you will be able to join us this year for a memorable event.



Feel free to contact our Administrative Office, at (617) 864-8140 to schedule your tour.

## Holidays at Shelter, Inc.

Each year following the excitement of the holiday season, we look back and say "It can't get any better!" Well, each year more and more companies, churches, organizations and individuals do more and more incredible things to make the Thanksgiving and Christmas holidays happy for our guests at the Cambridge Shelter and the Boston Family Shelter.

Food drives have become an integral part of the holiday season at Shelter Inc. The following are just a few of the wonderful folks who arrived at our doors with truckloads, carloads, and armloads of all types of food:

Faith Lutheran Church, Cambridge  
St. Mary's Parish, Cambridge  
St. Peter's Parish, Cambridge  
Belmont Day School  
Newton North High School/  
Riley House

In addition, Cambridge Mayor Walter Sullivan, and the Hotel Sonesta donated a large quantity of non-perishables to our Cambridge Shelter. Currier and Chives Caterers continue to provide our guests with some of the most fabulous meals available in the Boston area.

Special thanks go to the Coppedge and Johnson children who, along with their mothers, organized a Christmas Tea to benefit the families of Shelter, Inc. They invited their friends to join them for a pre-Christmas party and to share their own good fortune with others who don't have as much. Thank you all—especially Schuyler, Walker, Luke, Sophie, Cassandra, Abbie and Lyman.

Special thanks to everyone who remembered the homeless and hungry in 1986. Some of these who made the holidays brighter at Shelter, Inc. included:

Department of Public Welfare  
Filene's Basement of Boston  
First Church of Christ Scientist  
First and Second Church of Boston  
Franklin Sporting Goods  
Globe Santa  
Hasbro Industries  
Leading Edge Products, Inc.  
Mr. & Mrs. Alan Lewis  
Cambridge Montessori School  
Putting on the Knitz  
Rotary Club of Boston  
Reverend Tanzie  
Temple Beth El, Belmont  
Temple Emanuel, Newton  
The Timberland Company  
Women's Educational & Industrial Union  
Zayre Corporation

A million thanks to everyone we did not mention but whose caring and concern made 1986 a better year for all our guests.



Katrina, a former guest of the Boston Family Shelter, now happily relocated with her mom and baby sister, came back to visit at holiday time. Her expression shows all the wonder and joy of discovering all of the surprises hidden in our very special Christmas tree, entitled "My Favorite Things," donated by Eliot and Marilyn Ravech.

## Local Organizations Provide New Furnishings

Recently it became necessary to buy new furniture for the two living rooms at the Cambridge Shelter and new dining room furniture for the Boston Family Shelter.

Two local groups made it possible for us to purchase new, attractive, durable furniture.

The living rooms at the CS were furnished by a gift from the Harvard Community Volunteer Association from proceeds raised at a special event held by students at the Harvard Business School.

The dining room furniture was provided through the generosity of some longtime friends, the Beacon Hill Circle for Charity.

Our deepest thanks for their kindness and generosity.

If anyone has not had an opportunity to tour our facilities, please contact our administrative office to schedule a visit.

Your support is valued  
by the Board, staff and,  
especially the guests  
of Shelter, Inc.



The SHELTER Newsletter will be published semi-annually. Comments and suggestions are welcome. If you would like to be added to the mailing list, please call or write Pat Egan at Shelter, Inc.

### Board of Directors:

*President* ..... Alison S. Lauriat  
*Vice President* ..... Philip R. Giffey  
*Treasurer* ..... Thomas E. Kelleher  
*Secretary* ..... Katherine Fitzpatrick

*Executive Director* ..... David F. Whitty  
*Editor and Director of Development* .... Lois S. Grossman

THIS AGENCY IS  
SUPPORTED BY



United Way

**BOSTON FAMILY SHELTER**  
**267-8081**

**ADMINISTRATIVE OFFICE**  
**864-8140**

**CAMBRIDGE SHELTER**  
**547-1885**

# Shelter<sup>INC.</sup>

P.O. Box 516  
Cambridge, MA 02139

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Non-Profit Or  
Bulk Rate  
U.S. Postage  
P A I D  
Boston, MA  
Permit #5929

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## BOARD OF DIRECTORS

### President:

Alison S. Lauriat

### Vice President:

Philip R. Giffey

### Treasurer:

Thomas E. Kelleher

### Secretary:

Katherine FitzPatrick

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Clemmie L. Cash

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James M. Hayes

C. Vincent Haynes

Peter S. Kurzina

Rev. Philip H. Kylander

George F. McCray

John H. McDermott

Paul McGerigle

Anne S. Moore

J. Ernest Nunnally

Susan A. Rogers

Dr. Lenore Rubin

Suzanne Wadsworth

Douglas E. White

### Executive Director

David F. Whitty

### Administrative Offices

P.O. Box 516

Cambridge MA 02139

617-864-8140



Shelter, Inc. is a private, non-profit corporation.



# Shelter<sup>INC</sup>









# SHELTER IS EVOLVING...

From a small, all-volunteer organization which housed five homeless men in rented quarters in 1974 to today's thriving professional shelter system.

In dignified, homelike, community-based facilities, SHELTER, INC. provides meals, lodging, quality social services, and case advocacy to a thousand homeless people a year – whoever they are and whatever their needs. For some – SHELTER is a short-term refuge meeting the most immediate life-threatening needs of people with nowhere to go. For others – SHELTER is a temporary stop on the road to a more stable way of life.

## TO BETTER CARE FOR THE HOMELESS...

### WHO ARE THEY?

Men, women and children.

Alone and in families.

Some are mentally ill, others are retarded.

Some are handicapped, others are addicts.

Some are abused, others are ill.

All are down on their luck.

All have exhausted their resources and have no place to turn.

They do not choose to be here.

They are our friends and neighbors.

They need our help.







## HOW DID THEY BECOME HOMELESS?

Unemployment, loss and destruction of low-income housing, ill-planned and poorly executed deinstitutionalization policies, federal budget cuts and disability reviews have all conspired to swell their ranks to present epidemic proportions.

# THROUGH OUR UNIQUE PROGRAMS...

SHELTER, INC. operates two facilities in metropolitan Boston. Originally a temporary stop-over for the chronically homeless male, the CAMBRIDGE SHELTER has been shifting focus to provide more in-depth care and relocation services to men, women and families.

Located in a lovely house on a quiet street off Central Square, the CAMBRIDGE SHELTER provides overnight lodging, hot dinner and breakfast, counseling, casework and advocacy, and resettlement assistance to 20 needy people a night, as well as a long-term transitional unit at Cambridge YWCA for a single-parent woman and her family.

Some of our guests are given extensions until other outside social service agencies can place them... like Donna, who has a safe place at SHELTER until Elder Services can place her in appropriate housing.

Some stay on to work with our staff and social workers until they can find a place to live... like the Lanes, who after losing their jobs and their home, needed a safe place to pull themselves together.

Whether at SHELTER to escape the dangers of the streets, or waiting for housing one finds warmth, comfort and help at the CAMBRIDGE SHELTER.

The BOSTON FAMILY SHELTER, located in a brownstone in the South End, opened in April 1983 to help families get on their feet again. As a transitional

shelter with beds for 35 people (8-10 families), the BOSTON FAMILY SHELTER offers 24 hour day shelter, 3 meals a day, individual and family counseling, case advocacy, and relocation assistance.

With more and more families doubling up in apartments, living in cars and finally being forced onto the streets, the need for a special shelter which keeps families intact, including older boys, and provides support services becomes evident.

Adults accept responsibility for their children, save their income, participate in job and housing searches as well as assist in housekeeping and cooking.

## WHO ARE THESE FAMILIES?

Families like the Vegas... a mother, father and 3 children, who lost everything in a fire and need the time to save money and start anew.

Families like the Spencers... a mother and 2 children escaping an abusive husband, and thrown out of her sister's overcrowded apartment.

Families like the Daileys... a single-parent mother with 4 children, forced to leave a condemned building they called home.

Because of BOSTON FAMILY SHELTER, these families and many others have not had to become part of the chronically homeless. Because of BOSTON FAMILY SHELTER, 80% of these families are relocated into permanent housing within 2 months of their arrival.

Through SHELTER's kindness and care, many guests from both our facilities will be able to live out more dignified lives.

# WE LOOK TO THE FUTURE...

A future where despair is replaced with hope.

A future where more people will break the vicious cycle of street and shelter living.

A future where no one will live on the streets.







This future is part of SHELTER's plans.

So is... a transitional shelter for individual men and women. The only such program planned for the entire spectrum of homeless individuals in greater Boston, this 24 hour a day shelter will be modeled after our already successful programs.

Our goal... to find our guests a permanent place to live - whether it be a halfway house, a room in a supervised lodging house, a bed in a nursing home, or a small apartment or room.

So is... a supervised lodging house. Faced with a steady decline of the number of rooming houses in Boston, this facility would be a much needed part of the solution to the housing shortage for individuals.

Our goal... to run low-cost, clean, supervised, permanent living quarters for people who cannot, for whatever reasons, live alone.

So is... a long-term transitional facility for single-parent, female-headed families. These families are our most vulnerable.

Our goal... to spend a year helping our guests find jobs, job training programs, to help our guests get their high school diplomas, to help our guests learn basic life skills such as nutrition, budget management, child-rearing, and coping with stress.

With a decade of experience, SHELTER, INC. has emerged as a leading provider of community-based shelter programs in Massachusetts.

A model for the future... where advocacy, counseling, networking, warmth and human dignity all play an important part.



Our support is as innovative as our programming. We have forged a strong private/public partnership where government agencies, the United Way, foundations, corporations, and individuals all join the SHELTER movement.

# AS WE GROW OUR NEEDS GROW.

So we must ask you, our friends and neighbors,  
to help us help those who have fallen through  
the cracks.

Our services are free.

Our services are growing.

Our need is great.

Photography: Jerry Bernuth

Design: Rocket Beauregard/Lewis







ANN M. VINCOLA

Home

161 Buckminster Rd.  
Brookline, MA 02146  
(617) 277-6642

Office

286 Congress St. 7th fl.  
Boston, MA 02210  
(617)451-6766

EDUCATION

M.ED., Lesley College, Day Care Administration  
Emphasis - Supervision and Administration of  
Early Childhood Programs

B.A., State University of New York, College at Cortland  
Major- Education, Secondary English

Advanced Graduate work in Administration, Early Childhood  
Education, Reading, and Special Education

PROFESSIONAL EXPERIENCES

SUMMA ASSOCIATES, INC., Boston, Los Angeles, Phoenix, 1986-  
present

- Partner: Firm develops employer-supported child care programs. Provides specialized expertise in conducting needs assessments, cost analyses, and feasibility studies.

CORPORATE CHILD CARE CONSULTANTS, Boston, MA 1982-1986.

- President: Established consulting firm which offers assistance to corporations and institutions for the planning and development of child care facilities. Projects include on-site centers for industry; hospital based care; school-aged child care; family day care, and staff development.

STONEHILL COLLEGE, No. Easton, MA. 1979-1982.

- Assistant Professor of Education: Responsible for program in Early Childhood Education for Education majors and curriculum design for all Early Childhood Education courses. Served as Faculty Advisor to Education society and Educational Resource Center Coordinator. Organized and chaired the School Advisory Council.

WHEELLOCK COLLEGE, Boston, MA 1983-85.

- Instructor. Graduate School. Administration in Human Service Settings.







BEACON RESEARCH ASSOCIATES, INC., Boston, Mass. 1978-1979

- Educational Program Analyst: Responsible for the design and development of educational and training programs for various institutions and corporations.
- Urban-Suburban Magnet Program Development Project: This project assisted teachers in urban and suburban schools in the development of collaborative programs. Participated in all aspects of the project, including proposal writing, literature review and analysis, workshop design and delivery, and technical assistance to teachers. Project developed for the Massachusetts Department of Education.

BRIDGEWATER STATE COLLEGE, Bridgewater, Mass. 1975-1976

- Assistant Professor of Education: Faculty member in Department of Education. Courses taught: Strategies of Teaching Elementary Education.

SIMMONS COLLEGE, Boston, Mass. 1972-1975

- Director of Child Study Center: Administrator and Educational Supervisor of Laboratory School. Responsible for transition of facility from half-day program to full day care center. This involved: 1) writing proposal, devising budget and fiscal management systems and presenting to Advisory Board; 2) drafting staff job descriptions; 3) supervising design and renovation of facility; 4) developing funding programs; and 5) supervising maintenance. Responsibilities also included designing the educational program and developing curriculum for a diverse population.
- Supervisor of Student Teachers: Responsible for the supervision, consultation and evaluation of students in field placements in Boston-area pre-schools and Early Childhood Centers.
- Lecturer: Conducted curriculum workshops for the Department of Education.
- Teacher-Director, Child Study Center: Responsible for the general supervision, maintenance and administration of the laboratory school; served as head teacher, supervising one teacher, two assistants, and four student teachers; managed budget and daily operation of center.

HOUGHTON-MIFFLIN COMPANY, New York, New York 1969-1973

- Educational Consultant: Travelled throughout New England







and Middle Atlantic States, visiting urban and rural communities to work with teachers in Language Arts and Mathematics. Conducted inservice workshops for teachers, set up classroom learning centers, demonstrated teaching techniques and lectured to parent groups on materials provided by Houghton-Mifflin. Also advised and consulted with authors and editorial staff on content of texts.

BRIARCLIFF MIDDLE SCHOOL, Briarcliff Manor, N. Y. 1966-69

- Reading Specialist: Responsible for remedial reading program for children in grades 6,7, and 8.
- Teacher: Seventh grade English and Social Studies

HIGHLAND FALLS CENTRAL SCHOOL, Highland Falls, N. Y.  
1965-66

- Teacher: Seventh and Eighth Grade English

RELATED EXPERIENCES

RUNKLE SCHOOL EXTENDED DAY PROGRAM, Brookline, Mass.

- President: Served as Chairman of Board of Directors for parent cooperative program. Responsible for overall supervision of program and its functioning; giving guidance to teachers and parent committee; and providing continuous evaluation of program.

CONSULTANT TO LOCAL PUBLIC SCHOOLS AND DAY CARE CENTERS

- Pine Manor Child Study Center, Pine Manor College
- Easton Public Schools
- Brockton Public Schools
- HAL (High Ability Learners) Gifted program in Easton, Mass.

ADVISORY BOARD, Easton Teachers' Center

CAREER OPPORTUNITIES COMMITTEE, Stonehill College

PROFESSIONAL AFFILIATIONS AND HONORS







- Member, National Association for the Education of Young Children
- Member, American Association of University Women
- Elected to Who's Who in American Colleges and Universities
- Member, Action for Childrens' Television
- Steering Committee, Association for Early Childhood Teacher Educators

### PAPERS

- "Extending Desegregation Efforts Through Urban-Suburban Collaboration" Paper prepared for the Massachusetts Department of Education.
- "Proposal to Provide Assistance in the Development of Urban-Suburban Magnet Education Program". Paper prepared for the Massachusetts Department of Education.
- "Day Care Rationale". Paper prepared for the Department of Education and Child Study Advisory Board, Simmons College.
- "Industrial Day Care". Article in review in collaboration with Elaine Heller Dunn.
- "Maximizing Curriculum Instruction Through the Field-Based Component - A Developmental Approach for the Use of the Lab Experience for Education Students". Presentation for Association for Early Childhood Teacher Educators, Detroit, Michigan, 1981.

### WORKSHOPS AND CONFERENCES

- Conference Coordinator and Workshop Leader: "Part Time Magnet Education Program Proposal Development Workshop" United South End Settlement House, Boston, Mass.
- Coordinator: Superintendent's Informational Meeting on Urban-Suburban Collaborative Programs, Park Plaza Hotel, Boston, Mass.
- Workshop Leader: "The Use of Manipulative Materials in Teaching Mathematics to Primary Grade Children" NJEA Conference, Atlantic City, New Jersey.
- Workshop Leader: "Creative Math Instruction for Inter-







mediate Grades" NCTM National Conference, Anaheim,  
California.

PERSONAL

Married, two children.

REFERENCES

References sent upon request.







## I. THE COMPANY

Summa Associates is the first national consulting firm specializing in corporate child care. It was formed in September, 1986 through a merger of three regional firms: Burud and Associates, based in Los Angeles; Contemporary Ventures in Child Care, based in Phoenix; and Corporate Child Care Consultants, based in Boston. These office locations place the company in the two states with the largest corporate child care activity, California and Massachusetts, and in Arizona, the state with the fastest growing economy.

### CORPORATE EXECUTIVES AGREE...

"Professional child care expertise has been critical to the creation of a child care program tailor made to our organization. Because of careful planning in the early stages, the program is successful and we expect its values will only increase over time."

MICHAEL CONWAY, President  
*American West Airlines*

"At Transamerica Life Companies, we're concerned about child care issues because we know that when an employee comes to work, the entire family comes along. Through research we found that our workforce needs and wants child care assistance. Through the help of professional advisors, we found out how to make the most of our child care investment."

WILLIAM A. SIMPSON, President  
*Transamerica Companies*

"Employer-sponsored child care will be among the fastest growing benefits of the next decade. Employers benefit by meeting the demands of the marketplace through higher productivity, less tardiness, and less absenteeism."

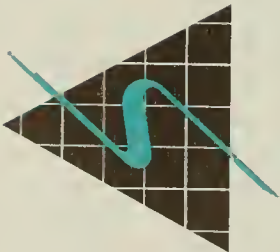
JIM MORRIS,  
Director of Survey Research  
*U.S. Chamber of Commerce*

"The program has been successful in all regards. It has helped our recruiting, cut down on turnover, shortened maternity leaves, and has generated a tremendous amount of free publicity for the company. Those employees who have no need for the center seem as enthusiastic about it as those who use it, and it has enhanced our image in the area as a progressive, employee-centered company."

LARRY G. HONEYWELL,  
Senior Vice President  
*Official Airline Guides  
Oakbrook, Illinois*







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## SUMMA ASSOCIATES, INC. PROVIDES THE KEY TO A SUCCESSFUL CORPORATE CHILD CARE PROGRAM



Summa Associates offers the first nationwide corporate child care planning and management service especially designed for large multi-site organizations and firms with diverse regional needs.

This capability combined with a breadth of experience allows Summa Associates to deliver a child care program which achieves the goals of management and is a valued service to employees.

With a flexible approach to each corporate challenge, Summa Associates has designed, developed, staffed and operated child care assistance programs that have set national standards of excellence.

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## THE PRINCIPALS OF SUMMA ASSOCIATES, INC.

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Acknowledged as creators of the most innovative child care management and benefit programs in the United States.

---



**SANDRA BURUD**

A leading researcher in child care benefit planning. Dr. Burud is the principal author of *Employer-Supported Child Care: Investing in Human Resources*, and *The 1987 U.S. Directory of Corporate Child Care Assistance Programs*.





# SUMMA ASSOCIATES, INC. OFFERS A FULL RANGE OF SERVICE

## PLANNING TOOLS

- Needs Assessments
- Feasibility Studies
- Productivity Impact Studies
- Facility Design
- Cost Analysis

## PROGRAM DEVELOPMENT

### Direct Services

Company child care centers  
Consortium centers  
Sick care programs  
School-age programs & summer camps  
Day care home networks

### Financial Assistance Programs

Dependent care assistance plans  
Vouchers  
Flexible spending accounts  
Discounts  
Corporate contributions

### Information Programs

Child care referral services  
Parent resource centers  
Parenting seminars

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**CYNTHIA RANSOM**

A financial analyst and accountant. Ms. Ransom has designed techniques to project and measure child care-related productivity changes for national corporations.



**ANN VINCOLA**

A recognized expert in the development of employer-supported child care programs. Ms. Vincola is experienced in conducting needs assessments, cost analyses and feasibility studies.



**KAREN WOODFORD**

A specialist in the on-going management of child care programs. Ms. Woodford has expertise in staff training as well as curriculum planning and program evaluation.



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## CLIENTS OF SUMMA ASSOCIATES PRINCIPALS

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- America West Airlines
- American Medical International
- Arizona Public Service
- Arthur Andersen & Company
- Bashas' Markets
- Bose Corporation
- Cedars-Sinai Medical Center
- City of Santa Monica
- Framingham Union Hospital
- Hill, Holliday, Cannors, Cosmopolis
- The Howard Johnson Company
- Los Angeles Department of Water and Power
- Massachusetts Metro-West Chamber of Commerce
- Mattel, Inc.
- Medtronic Micro-Rel
- National Association of Hospital-Affiliated Child Care Programs
- National Medical Enterprises
- Prime Computer, Inc.
- Providence Hospital of Alaska
- Southwest Savings and Loan
- State of Arizona
- State of Tennessee
- Transamerica Life Companies
- Union Bank
- Wellesley College



*Corporate Child Care Planning & Management*

BOSTON • LOS ANGELES • PHOENIX

CORPORATE HEADQUARTERS:

286 CONGRESS  
BOSTON, MA 02110  
TELEPHONE: (617) 451-6766



## I. THE COMPANY

Summa Associates is the first national consulting firm specializing in corporate child care. It was formed in September, 1986 through a merger of three regional firms: Burud and Associates, based in Los Angeles; Contemporary Ventures in Child Care, based in Phoenix; and Corporate Child Care Consultants, based in Boston. These office locations place the company in the two states with the largest corporate child care activity, California and Massachusetts, and in Arizona, the state with the fastest growing economy.

Summa's guiding corporate philosophy is to be the industry leader in corporate child care. The primary focus of the company is providing consulting and planning services to employers concerned with their employees' child care needs. Summa seeks to design child care assistance programs which are most effective at addressing employee child care needs and improving corporate productivity.

In response to its goal of being the premier consulting organization, Summa is a company of first. It has been the first to

- \* develop a comprehensive system for assessing employee child care needs and conducting feasibility and productivity impact studies;
- \* develop a complete system of options rather than a single product that may or may not meet an employer's child care needs;
- \* develop coast to coast capabilities to meet the needs of multi-site corporations;
- \* develop a plan to actively market the concept of corporate child care on a national scale;
- \* develop extensive expertise in a variety of options and the capability to work with different types of businesses;
- \* publish an exhaustive national list of companies which have child care programs in place.

The services provided by Summa permit employers to acquire complete information on which to base a judgment, including the multitude of alternatives, a cost-benefit analysis, and potential risks and projections. The experience of Summa Associates in planning, designing and operating successful programs permits the client to benefit from this experience and avoid the mistakes others have made. Clients know ahead of time what works and what does not work.







## II. CORPORATE CAPABILITIES

Summa Associates, Inc. is a full service consulting firm specializing in employer-supported child care. The principals of the company have been servicing the child care needs of business and industry, governmental agencies and educational institutions for over a decade. The firm provides clients with the information essential to making important decisions regarding the formation of child care assistance programs from the wide range of available options. Seminars and training for employers, employees, parents and providers are also provided.

Summa offers a wide range of services including:

- \* Needs Assessment/Feasibility Studies
- \* Development of On-site Child Care Centers
- \* Cost/Benefit Analysis
- \* Parent Seminars
- \* Resource and Referral Systems
- \* Family Home Care Networks
- \* Program and Staff Development
- \* Child Care Center Management
- \* Program Evaluation

Summa Associates, Inc. is uniquely qualified to assist its clients, both large and small, in the intricate and involved process of establishing and managing programs for employees who are working parents. The firm has extensive experience in preparing studies, creating programs and managing child care centers.

Ann Vincola is nationally recognized for expertise in the development of employer-supported child care programs, as well as program design and implementation. She is the designer and creator of on-site child care centers for two major New England corporations.

A founding member, and member of the steering committee of the New England Employer-Supported Child Care Network, she has also served as a consultant to the Massachusetts Department of Education and to other institutions.

Specializing in research, needs assessment and cost analysis, Ms. Vincola assisted a five-company consortium developing a child care needs assessment and feasibility study. She has also designed and developed several other child care centers, and consults on the on-going management of numerous child care facilities.

Ms. Vincola has been as Assistant Professor of Early Childhood Education in Administration for several Boston area colleges.

### Description of Several Local Projects

Town of Randolph, Massachusetts - Summa is working with the Randolph Foundation, Inc. to develop a daycare center for 100 children for the school system, the Town, and the business community in Randolph. The project is being funded through a variety of sources and Summa is assisting in securing this funding.







Combined Jewish Philanthropies - Summa is currently under contract with CJP to assist in the development of new day care centers in the Greater Boston area for the Jewish community with input from Jewish Community Centers and Jewish Family and Children's Services. Consultation is also provided to other start up and currently operating Jewish affiliated centers.

Greater Quincy Child Care Center - Summa is under contract with GQCCC to provide technical assistance in the management and on-going operation of the center. This center is governed by a Parent Board of Directors with assistance from O'Connell Brothers Management and State Street Bank.

Framingham Union Hospital - Summa conducted a Needs Assessment for this hospital to assess the child care needs of 500 employees. This data collection will help the hospital make a determination regarding child care assistance for their 1,500 employees.

Metrowest Chamber of Commerce - In March, 1986, Summa conducted a Needs Assessment for the Metrowest Chamber of Commerce, Framingham, Massachusetts for the purpose of assessing the child care needs of employees at Bose Corporation, Prime Computer, Consolidated Group Trust, The Middlesex News, and Integrated Genetics for the future consideration of an infant/toddler center located in or near the Framingham Industrial Park. This Needs Assessment consisted of the design and drafting of a questionnaire for 1,600 employees, interviews with company employees, tabulation and item analysis of results, investigation of area day care services, and recommendations and a final report. Summa then completed a cost analysis and fiscal development for the proposed center.

Hill, Holliday, Connors, Cosmopulos - Summa was under contract with HHCC from October 1984 through November 1985 for the design and development of a near-site child care center. The contract included design and start-up phases and technical assistance necessary for the successful opening of a near-site center. The center opened on October 30, 1985, licensed for 37 children aged 2 months to 6 years. Summa continues to work with HHCC on a consulting basis for budgetary and staff development purposes. Summa is also developing a Family Daycare System for HHCC to supplement the available slots for infant care.

Dunkin'Donuts - Dunkin'Donuts of Randolph, Massachusetts contracted with Summa in October 1984 to conduct a Needs Assessment and Cost Analysis for the possible inclusion of a child care facility during a new construction phase. The Needs Assessment consisted of the design of a questionnaire for 350 employees; tabulation and item analysis of the results, cost analysis based on finds; and a final report and recommendations present to management.

Howard Johnson Company - Howard Johnson Company contracted with Summa in November 1983 to investigate and research the feasibility of on-site child care at their new corporate headquarters at Monarch III in North Quincy, Massachusetts. The investigation was divided into three phases: Phase I - Research; Phase II - Needs Assessment and Cost Analysis; and Phase III - Implementation. The center opened in August 1984 with a licensed capacity of 57 children aged 3 months to 5 years.







Additional clients include:

Children's Hospital/Harvard Medical School  
New England Memorial Hospital  
Wellesley College  
Babson College  
Wellesley Community Children's Center  
Resource Center for Business at Salem State College  
Bates Shoe Company

### III. SERVICES

Summa Associates, Inc. is a specialized consulting firm offering a wide range of services. Summa is unique in that it is the first nationwide corporate child care planning and consulting management service especially designed for large multi-site organizations and firms with diverse regional needs. This capability, combined with a breadth of experience, allows Summa Associates to deliver a child care program which achieves the goals of management and is a valued service to employees. Summa Associates has designed, developed staff, and operated child care assistance programs that have set national standards of excellence by offering a flexible approach to each corporate challenge. The firm's appeal to large corporations is that it is highly skilled in assisting companies in the decision-making phase of child care planning and recommends only the program or solution that fits the needs of the company. Summa has experience developing all options and alternatives and does not attempt to "sell" any one option.

The services provided by the firm are described below:

#### Planning Services

- o Needs Assessment/Feasibility Study
- o Productivity Impact Study

#### Program Design, Implementation and Management

- o Company Child Care Center or Consortium Center
  - \* center design
  - \* program development services
  - \* center management
- o Day Care Home Network
- o Sick Child Care Program
- o Financial Assistance Programs







# CORPORATE CHILD CARE CONSULTANTS

## METROPOLITAN BRIEFING

### Corporate day care spreading

By Muriel Cohen  
Globe Staff

Nine-month-old Caitlin Lally and her mother, Catherine, go to work together each morning.

Catherine Lally begins her day at 9 a.m. as an executive secretary at headquarters of the Howard Johnson Co. in North Quincy.

Before taking the elevator to her sixth floor office, she leaves chubby Caitlin to the growing up tasks she expects of her infant — how to socialize, to drink from a cup, to eat finger food — in the hands of a certified teacher in the spacious new Johnson-run day care center on the building's ground floor.

Caitlin and her mother are among the growing number of day care clients at corporate-sponsored centers opening around the country to accommodate parents needing reliable, quality child care.

While day care used to be regarded as a service for welfare mothers, today the clamor for reliable, quality help with children is coming from professional parents, middle management as well as clerical and blue collar workers.

State data indicates that within five years, there will be 10.4 million children under the age of six with working mothers; 10 years ago 34 percent of mothers with children under the age of three were in the work force; by 1982, the percentage of working mothers with toddlers increased to 46 percent.

Massachusetts, according to child care specialists, leads the nation in the number of employers who, like the Howard Johnson Co., run day care centers or, like IBM, provide information and referral on day care to their employees.

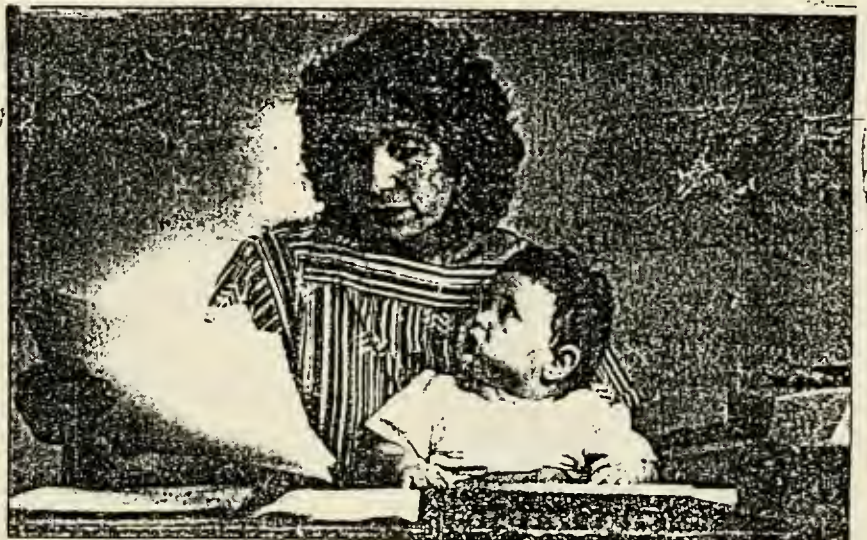
For the first time, the governor's office is backing the demand by parents for day care. The state has joined parent groups and other agencies in encouraging business and industry to help improve the quality of family life by sharing responsibility for their employees' children.

METROPOLITAN BRIEFING, Page 8



Edward Naim joins two friends as he waits for his mother at the Howard Johnson's child care center.

PHOTOS BY JANET KNOTT



Caitlin Lally watches as her mother, Catherine, looks over next week's schedule.





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# More companies providing day care

## ■ METROPOLITAN BRIEFING

Continued from Page 1

"We are seeing a time in the state's economy where we will have to attract more people into the labor force, including women," said Evelyn Murphy, state secretary of economic affairs.

"Day care is a work force and labor force issue," Murphy continued. Last week Murphy met with employers in Peabody, Lawrence and Lowell to encourage them to explore day care options for employees.

At the present time, parents find there are a variety of child care strategies: placement in a home with a mother caring for up to six children; care in a center, run by an employer or a community agency, or a patchwork of sitters and assistance from family members.

For the Lally family, there was no family help available, and Caitlin has spent most of her first nine months in the home of a warm and youthful grandmother at a cost that sometimes ran up to \$140 a week.

But with the opening of the Johnson Center, Catherine Lally cut down her cost and travel time. On paper, fees for Johnson em-

ployees are set at \$100 for a five day week for infants like Caitlin. But by the time the tax arrangements made by Johnson are worked out, Lally said the actual cost to her is \$61 weekly.

Howard Johnson has joined a number of companies with headquarters in Massachusetts that have made day care a corporate concern. Among those listed in a new brochure issued by the state are Stride Rite, with centers in Cambridge and Boston, Polaroid in Cambridge, Gillette in Boston, Wang in Lowell and Zayre in Natick. Hospitals and universities have also set up centers.

Until the Johnson Center opened two weeks ago, Catherine Lally each morning washed, dressed, diapered and fed Caitlin, bundled her into the car and drove 30 minutes from her home in Stoughton to leave her with the babysitter and then traveled another 30 minutes to her job in Quincy. Each day at 5, Lally reversed the process, driving half an hour to pick up Caitlin and another 30 minutes home with a tired, sometimes cranky infant.

"I used to be angry when I would get there and I knew the sitter was giving Caitlin lasagna or giving her a bottle when I specif-

cally asked her not to," said Catherine Lally.

"Here they work with me. We discuss what I am doing at home, and they are helping me try her on new foods. They will help me with toilet training.

"I wanted at-home care for Caitlin, but couldn't find anyone. I wanted to make sure she wasn't thrown in a play pen all day.

"I want her to get a lot of attention, that she would get changed often and that if she refused her bottle, there would be a later try," Lally continued.

Last Friday, Caitlin was one of two infants in the nursery with teacher Margaret Ryans.

Lally said she was the perfect candidate for the corporate center. Her husband is a Boston Police officer "with crazy hours," and her mother went back to school, got a job and "does her own thing," Lally said.

For Lally the choice was obvious, but other parents turn to the Child Care Resource Center in Cambridge, a 13-year-old referral and resource agency.

Boston University Prof. Dorothy Kelly, who lives in Allston, called the center for help in arranging care for the baby she expects this month.

## Where to call for day care information

*The following is a list of organizations that can be called for help in obtaining information on particular day care programs:*

Administration for Children, Youth and Families, HHS  
JFK Federal Bldg. Rm. 20, Boston 02203  
(617) 223-6450

Child Care Brokers, Ltd.  
120 Dorset rd., Newton 02168  
(617) 224-2991, 946-4577

Child Care Circuit  
PO Box 42, Ballardvale Station, Andover 01810  
(617) 475-3602

Child Care Information Services, Inc.  
66 Summer st., Foxborough 02035  
(617) 543-3345

Child Care Management, Inc.  
609 Honeywell st., Needham 02194  
(617) 444-4880

Child Care Resource Center, Inc.

24 Thorndike st., Cambridge 02141  
250 Stuart st., Boston 02116  
(617) 547-9861

Child Care Systems  
51 Wendell st., Cambridge 02138  
(617) 876-2329

COPE  
37 Clarendon st., Boston 02115  
(617) 357-5863

Corporate Child Care Consultants  
65 Franklin st., Boston 02110  
(617) 426-2304

Kinder Care Learning Centers, Inc.  
P.O. Box 2151, Montgomery, Ala. 36197  
(205) 227-5090

Mass. Office for Children  
150 Causeway st., Boston 02114  
(617) 727-0018

Prospect Hill Parents' and Childrens' Center  
100 Fifth av., Waltham 02154  
(617) 890-5438

Rodgers & Associates, Inc.  
93 Abbottsford rd., Brookline 02146  
(617) 566-4962

School-Age Child Care Project  
Wellesley College, Wellesley 02181  
(617) 431-1453

South Shore Day Care Services, Inc.  
25 Grow av., Braintree 02184  
(617) 848-4610

SureCare, Inc.  
PO Box 200, Beverly 01915  
(617) 927-8741

Wheelock College Center for Parenting Studies  
200 The Riverway, Boston 02215  
(617) 734-5200

Work/Family Directions  
200 The Riverway, Boston 02215  
(617) 734-0001

Work Options Unlimited  
645 Boylston st., Boston 02216  
(617) 247-3600

Women's Bureau, Department of Labor

JFK Federal Bldg., Rm. 1600, Boston 02203  
(617) 223-4036







"I need part time care for the fall and full-time care in mid-January. They have been very good in giving me names and suggestions and general psychological help," said Kelly.

The center began in 1980 to encourage and advise employers to become involved in child care. Now its former executive director, Ethel McGonaghy, has joined a new venture, Work/Family Directions, which recently signed a pioneering contract with IBM, the business machines giant.

Directions is being run by a joint venture, Rodgers and Associates and Wheelock College, which trains preschool educators. Heading the IBM program are two veteran child care experts, Francene S. Rodgers and Gwen Morgan.

IBM is the first employer with sites around the country to respond to child care needs of employees on a national basis, Rodgers said last week.

Directions will furnish IBM staff members with information on how to locate and evaluate child care. In addition, the program will train potential child care providers to expand available services.

While IBM has chosen to help employees find services, Howard Johnson has opted to run its own center. When at capacity, the center expects to have 65 youngsters, from three months to 5 years. They will be children of company employees, like Caltlin, or of others who work in the busy office complex or from the Quincy community.

With the help of consultant Ann Vincola, an instructor at Wheelock, Johnson moved swiftly to take the day care proposal from an idea on paper to the four-classroom suite it now occupies.

"One reason for the speed was the support of G. Milton Hostage, president of Howard Johnson Co.," said Catherine (Cass) Wolfe, director of the center. Hostage, who has 10 children himself, regards quality day care as a way of recruiting staff and of showing that the company is concerned about the quality of life of its employees, said one company official.

"I was a skeptic about day care," remarked Lally. "But now I have absolutely no qualms. Caltlin is being taken care of by another Mom."



Patricia DelVal reads a story to young Patrick at child care center.

GLOBE PHOTO BY JANET KNOTT

## A list of employer-supported child care programs in Mass.

*Following is a list of employer-supported child care programs in Massachusetts:*

Abt Associates, Cambridge  
Bank of Boston, Boston  
Beverly Hospital, Beverly  
Boston City Hospital, Boston  
Boston University, Boston  
Brandeis University, Waltham  
Bridgewater State College, Bridgewater  
Brookline Public Schools, Brookline  
Burbank Hospital in Fitchburg, Fitchburg  
Cambridge Rindge and Latin High School, Cambridge  
Cambridge School of Weston, Weston  
Commonwealth Children's Center, Boston  
Eastern Uniform Company, Norwell  
Federal Reserve Bank, Boston  
Fernald School, Waltham  
Franklin Square House Day Care, Roxbury  
Framingham State College, Framingham  
Friends of Hathorne Day Care, Hathorne  
Gillette Company, Boston  
Government Center Child Care, Boston  
Howard Johnson Co., North Quincy  
The Humphrey Occupational Resource Center, Roxbury  
John Hancock Mutual Life Insurance Company, Boston  
Lowell General Hospital, Lowell  
MASCO Childcare Center, Boston  
MASSPORT, Boston

The Massachusetts Hospital School, Canton  
Massachusetts Institute of Technology, Cambridge  
Middlesex County Hospital, Waltham  
New England Life Insurance Company, Boston  
New England Memorial Hospital, Stoneham  
Newton-Wellesley Hospital, Newton  
North Shore Children's Hospital, Peabody  
Northeastern University, Boston  
Parker Metals, Worcester  
Polaroid Corporation, Cambridge  
Ring Nursing Home Day Care Center, Springfield  
St. Elizabeth's Hospital, Brighton  
Salem State College, Salem  
Lemuel Shattuck Hospital, Jamaica Plain  
Southeastern Massachusetts University (SMU), Dartmouth  
Stride Rite Children's Center, Cambridge and Boston  
Tufts University, Medford  
University of Massachusetts/Amherst, Amherst  
University of Massachusetts/Boston, Boston  
Van Brode Group, Clinton  
Veterans Administration Hospital, Brockton  
Veterans Administration Hospital, Jamaica Plain  
Wang Laboratories, Lowell  
Wellesley College, Wellesley  
Zayre Corporation, Natick









# Money

WEDNESDAY, JUNE 17, 1987

## COVER STORY

# Child-care plans take 1st steps

Controversy expected to force more companies to provide new benefit

By Mark Memmott  
USA TODAY

Tim Townley-Wren can't really describe the misery he went through last summer. "Awful" is the only word he says comes to mind.

But his feelings have turned full circle. "Now I don't have any worries," he says. "I can go to work and do my job without calling

home every time I pass a phone."

The difference between then and now: Last summer Townley-Wren, a pilot for Phoenix, Ariz.-based America West Airlines Inc., was on his own when it came to making child-care arrangements for his son and daughter. Now, the divorced father, who cares for the children in summer, takes advantage of something new: America West's 24-hours-a-day, seven-days-a-week child-care programs.

Whenever Townley-Wren has to fly out of town, even on short notice, he takes 9-year-old Adam and 5-year-old Sarah to the home of Joann Fane, a trained child-care provider. Even if that means the children must stay overnight. "I'll give them dinner, put them in their jammies and off they go," he says.

Townley-Wren's one of a lucky few. America West is one of just 3,000 USA companies that have any type of child-care policy or program. The company contracted with the consulting firm Summa Associates Inc. to screen and train Fane and other home-based care providers, and to organize a 24-hour care center that can accommodate up to 16 children at night.

While the number of companies involved in child care is up about 50% from 1984, a USA TODAY poll of 802 working adults found that just 4% worked for companies that offer day-care benefits. The most recent Conference Board survey on child care put the number at 5.7%.

Child care, which some say will be the "benefit issue of the 1990s," is still largely left up to the parents. That's despite a dramatic rise in the number of working mothers: 60.8% of women with children under 18 now work, the Commerce Department's Census Bureau estimates, up from 34.7% in 1960.

Even though some companies have met the issue of substance abuse head-on by testing workers for illegal drugs, many companies have decided to leave the child-care issue alone. Questions about liability insurance, uncertainty about whether productivity will pick up enough to warrant the cost, and complex state and local

zoning regulations are just a few reasons employers give for not getting involved.

The burden on parents can be heavy. "I had a list of 10 baby sitters, some of whom I'd only just met," Townley-Wren says of his day-care problems last summer. "If the airline called at 6 a.m. and said the plane goes at 7 a.m. I had to make a lot of calls and hope for the best."

"That happened just four days after the kids came for the summer," Townley-Wren says.

"I remember thinking as the plane took off that my kids were down there with someone they'd never met in a strange city where they didn't know anyone. That was really a bad feeling."

Guilt can also build up. Judy Godfrey often feels that way. Also divorced, she has sometimes sent her daughters (Heather, 10; Sara, 8; Stacy, 6) to school when they've been sick. "No baby sitter wants throwing-up kids," says Godfrey, an executive secretary at Ford Motor Co. in Detroit.

If she were to stay home, Godfrey would have to either lie and say she was the one who was sick, or take a personal day. Taking a day off for a sick child is frowned upon, she says.

"I feel really bad sending them to school like that," says Godfrey. "I hope they get better or that if they don't the school calls me and says they're sending them home. Then at least I can tell the boss I've got to go."

But the situation doesn't have to get that serious before a working parent feels guilty. Patti Cloar of Macomb, Ill., works "because I want to. But that doesn't mean I don't feel some guilt."

An office manager and controller at an ambulatory surgery center, she has missed almost every school activity her 6-year-old son Cameron has been involved in. "I wish the schools would do more things in the evenings," she says.

Things shouldn't be that tough for working parents, however, says America West President and Chief Operating Officer Michael Conway. "These individuals have a significant need," he says of working parents, "and it's affordable, quality child care."

"Right now most companies are light years behind where they should be on this. We feel a program was the right thing to do," Conway says. "Especially if you want to get the best people to work for you. If you've got a potential employee and he or she sees you've got a comprehensive child-care program, it sends that person a message — that you care about them."

While America West might be the only company that has set up child-care programs that can be used around the clock (to accommodate the unusual schedules of its pilots, flight attendants and reserva-

tions clerks), other companies also have significant programs:

■ Campbell Soup Co. opened a day care center at its Camden, N.J., head quarters and plant in 1983. It can handle 120 children and plans to almost triple the capacity.

■ First Bank System Inc. in Minneapolis started its All's Well program in September 1986. It helps parents cope with the days when their children are too sick to go to their regular sitters by subsidizing their stay at one of the city's Chicken Soup centers. First Bank pays \$30 of the \$40 daily charge at the centers, which are designed to handle children with such relatively mild maladies as cold and chicken pox.

■ Steelcase Inc. in Grand Rapids, Mich., is one of a number of companies that have set up a child-care referral service. It evaluates local day-care providers and then helps inquiring parents pick a service that suits their needs.

There are some indications that business-supported child-care programs might increase from their relatively small number in the next few years: Consultants like Summa Associates, which has offices in Boston, Phoenix and Los Angeles, are springing up. Other child care related services for businesses are also sprouting: ChildCare Voucher, a Milwaukee-based company, just went national. It will set up programs for companies that allow their employees to set aside part of their salaries, without paying taxes on those amounts, for child-care expenses. Then they pay those bills with vouchers issued by ChildCare.

If the number of companies with child-care programs does grow significantly, it won't be just the working parents who benefit, says Townley-Wren. Businesses also will increase the number of loyal workers in their ranks.

"I'd been with several small commuter airlines and I've only been with America West a little more than a year," he says, "but I can guarantee I don't have any applications or résumés out now. I'm extremely proud of what this airline has done. It's a model for the industry."

"My kids are in a nice home that they like when I'm not here. The husband there's a state trooper. It's about the best situation I can think of. Compared to with last year, it's like day and night."

Conway, America West's president, says the growth of child care into a standard employment benefit is almost inevitable. "As more programs start up," he says, "the reluctant companies will be embarrassed into doing something."







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***'Employee Benefit of the '80s'***

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## More Firms Providing Child Care Assistance

By ELLEN FARLEY, Times Staff Writer

Unable to find adequate child care during the workweek, Elsa Djenabi, 29, a claims examiner at Transamerica Occidental Life Insurance Co., sent her 3-year-old daughter to live with her mother, 50 miles away.

"I can only see my daughter one day during the week," she said. "If I'm at home with my husband, I worry about my daughter. If I'm with my daughter, I worry about my husband."

Now, however, thanks to a child care assistance program begun last week by Transamerica, there's a good chance that "we'll be a family again," Djenabi said. For the benefit of the 3,700 employees at its downtown office, Transamerica has established a free, on-site child care referral and resource service

that's available two days a week.

Employees with child care needs are interviewed by experienced counselors who match families with selected day care services that have openings. Djenabi, who wants "quality" day care offering meals and health care, pronounced herself "very excited" about having the matter handled for her at her workplace. "It really puts your mind at ease," she said.

Child care assistance has been called the employee "benefit of the '80s" by Margaret Heckler, secretary of the U.S. Department of Health and Human Services. But the department's recently completed study of employer-supported child care projects found only 2,850 companies nationwide that

**Please see FIRMS, Page 3**

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# Large Firms, Government Unite to Fund Child-Care Services

By DEBRA WHITEFIELD, Times Staff Writer

Feeding plans from government leaders and their own employees for more and better child care, several large California employers this week formed an unusual coalition with the public sector to finance the recruitment and training of child-care providers.

And, on a second front in the war for child-care, Los Angeles-based Union Bank disclosed that it is building a child-care center on the first floor of its new bank building under construction in Monterey Park. It is believed to be the first Los Angeles company to offer its employees child care at the site of employment.

The coalition, called the California Child Care Initiative, said it will give \$400,000 to six state-funded child-care resource and referral agencies, which in turn will recruit and train new child-care providers.

The funding also will help the recruits meet state licensing requirements and begin delivering child-care services.

"We took this project on because we recognized early last year that there was a substantial community need," said Rosemary Mara, associate director of the BankAmerica Foundation, lead organizer of the statewide drive to improve child care.

"After considering our own employee needs and the encouragement from the White House for private sector initiatives, we decided our dollars would be most effectively used by taking advantage of the momentum these local referral agencies have developed in building the supply of child-care providers."

The approach is unusual because it focuses on a long-term, statewide

solution to the child-care shortage, encourages both public and private participation and is altruistic.

"We could have put the money into a fixed facility only for our own employees," said Barry Laszrah, manager of contributions for Chevron USA Inc., a major contributor to the coalition.

"But that doesn't really improve the quantity or quality of child-care facilities. It doesn't do anything for the community and, in the long-term, it doesn't do much for our employees. A coalition and long-term solutions makes much more sense."

Another consideration was the growing concern over child abuse at child-care centers, exemplified by the McMartin Pre-School molestation case.

"By focusing our efforts on recruiting and screening . . . we

hope this will give us some measure of control over the quality of services available in the community," Mara said.

With the latest baby boom and the growing number of working parents, the child-care shortage has reached a critical stage. The United Way estimates that, in central Los Angeles, for example, child-care agencies receive up to 200 requests per month for infant-care services, but only 650 spaces exist.

To try to ease the problem, employer-supported child-care programs have proliferated nationwide.

In June, 1982, about 415 U.S. companies provided some type of child-care assistance; today, the number is 3,000, said Sandra L. Burud, a Los Angeles consultant and author of a study on child care.

Of these, she said, about 650 offer on-site child-care centers, the approach that Union Bank decided to take.

When Union's child-care center opens in mid-1986, it will serve about 60 infants and preschoolers, said Carolyn Savely, a Union vice president and manager of service-center personnel.

Although the details haven't been worked out, she said the bank expects to subsidize the cost through a sliding-scale tuition based on the child's age and the employee's salary.

The bulk of the funding for the other program is being provided by BankAmerica Foundation, Chevron and Mervyns, each of which has contributed \$100,000 to the effort. The Clorox Co. Foundation, Pacific Gas & Electric Co. and San Francisco County gave \$25,000 apiece. McKesson Corp. contributed \$15,000 and Contra Costa County gave \$10,000.

In the first phase of the test program, the corporate contributions will go to aid recruitment and training of child-care providers in Santa Monica, Long Beach, Bakersfield, San Francisco, Concord and Sacramento.

## Umbrella Organization

Specifically, these child-care referral centers, all of them state-funded, will receive funds: The Children's Home Society in Long Beach, Connections for Children in Santa Monica, the Children's Council of San Francisco, Contra Costa Children's Council in Concord, Child Action Inc. in Sacramento and Community Connection in Bakersfield.

These agencies will be linked by an umbrella organization called the California Child Care Resource and Referral Network, a nonprofit organization founded in 1980 to support and promote child-care referral services.

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